

A Business Development Strategy for Leesburg, Virginia



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Prepared for the Town of Leesburg

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Appendix A: Strategic Assessment of Leesburg, Virginia

Appendix B: A Market Assessment of Leesburg, Virginia



Figure 1-1: Downtown Leesburg from the Courthouse Green

1.0 Introduction

1.1 Background and Purpose

Leesburg, Virginia is a vibrant community located in one of the fastest growing counties in the United States. Richly historic, Leesburg has managed to preserve its heritage in light of its own rapid growth as well as that of the surrounding area.

The community has enjoyed unprecedented growth both as a place to live and as a visitor destination. In spite of this success, the community's future hinges on its ability to organize for future economic development, sustain and enhance downtown as a place for residents and visitors alike, and create new opportunities for investment to take place.

In June of 2002, Arnett Muldrow & Associates was hired alongside Mahan Rykiel Associates to complete a Business Development Strategy for Leesburg. Early in the process, the plan scope shifted from simply examining the downtown area to a town-wide effort recognizing that all districts of the town are interdependent for economic success. In spite of this shift, it is important to define what exactly is considered part of the "downtown" for the purposes of this report. Rather than the traditional thought of downtown as the "historic district," the downtown should be thought of as any of the older commercial districts inside the bypass. This is important in that it expands the traditional thought of the downtown while providing an important link to the historic core for businesses in aging commercial corridors.

The overall purpose of this study is fivefold:

1. To recommend ways for the town of Leesburg to enhance its standing as a place to do business both for the local population and for visitors.
2. To suggest physical improvements to the community that can take place over time.
3. To relate the important role of historic preservation to the overall business development strategy for Leesburg.
4. To establish an implementation strategy that will involve a partnership between many stakeholders.
5. To recommend strategies for funding the public improvements that will complement the private sector investments that will come as a result of this study.

1.2 Process

The process for Leesburg began in July of 2002 with over forty interviews of stakeholders, property owners, citizens, and other interested individuals. In addition, the team conducted a comprehensive reconnaissance of the town examining the business sectors, areas of growth, and the historic district. The initial findings of the interviews and reconnaissance are included in Appendix A of this report.

From that initial information, the consultants worked with fourteen businesses on a zip code survey that recorded 1498 individual store visits during a one week period in September. From that information, a detailed market definition study was completed alongside a sales and retail leakage analysis for the community. This information is presented in Appendix B of this report.

Both of these key components of the report became the basis of the recommendations included in the report below.

1.3 Report Format

This plan report is designed to present the findings of the Business Development Strategy Plan in a brief and easy to understand format. It relates all of the Business Development Strategy recommendations to six strategies for the future, each of which contains important steps in implementing the plan. These implementation steps are presented as short, medium and, where necessary, long-term improvements.

The report concludes with an implementation strategy and action plan designed to outline the steps needed to begin implementation. This strategy is summarized in a “Strategy Board” which distills all of the recommendations of the Business Development Strategy into a one-sheet document.

Three important appendices support the report. Appendix A is the strategic assessment report that summarizes the input received in interviews with stakeholders, public meetings, and meetings with various groups in Leesburg. Appendix B is a detailed market assessment of Leesburg that was conducted to provide the economic framework under which the plan is presented. This information is included in detail and is an important component of the Business Development Strategy document.

1.4 Acknowledgments

This report would not have been possible without the participation of many important people in Leesburg. Special thanks go to the Economic Development Commission who served as the de-facto steering committee for this report. Thanks also go to the many merchants and property owners who candidly shared their thoughts and hopes as we developed this report.

2.0 Six Strategies for Downtown Leesburg

2.1 Hometown Downtown: A Place for Leesburg Residents

2.1.1 Goal

Leesburg's downtown diversifies to appeal to a broad cross-section of town residents. It offers entertainment, dining, and shopping geared toward the local population while continuing to serve the visitor market.

2.1.2 Background

- A "snapshot" of Leesburg retail trends was collected during a weeklong zip code survey of customers. This information was designed to provide an overview of retail trends and a baseline for determining the consumer trade area. This effort is covered in detail in Appendix B.
- The data research conducted during the Zip Code Survey indicates that residents of Leesburg are not interacting with downtown on a regular basis. In fact, local residents inside the two Leesburg Zip Codes accounted for only 21% of the visits to local shops.
- Downtown shops that participated in the survey recorded only eight visits per thousand residents of Leesburg during the one-week period the survey was conducted.
- Visits from communities considered "local" to Leesburg to the east (Reston, Herndon, Sterling) had visits at less than one customer per thousand residents of these areas.
- Interviewees frequently cited a lack of diversity both in store and restaurant types and in price point as well as a lack of entertainment options as reasons that downtown is not drawing a larger customer base from the local market.

2.1.3 Assets/Opportunities

- Downtown Leesburg represents a truly unique environment in the county and region. It is an authentic town center, conveniently located to residents.
- The re-opening of the Tally-Ho Theater represents a significant opportunity to bring people back to downtown on a regular basis.

| Name | Customer Visits | % of Total Visits | Population | Cust/1,000 population |
|--------------|-----------------|-------------------|------------|-----------------------|
| Herndon | 15 | 0.6% | 76,555 | 0.2 |
| Manassass | 29 | 1.2% | 116,241 | 0.2 |
| Centreville | 21 | 0.8% | 63,827 | 0.3 |
| Sterling | 56 | 2.3% | 71,201 | 0.8 |
| Reston | 47 | 1.9% | 58,128 | 0.8 |
| Ashburn | 68 | 2.7% | 36,205 | 1.9 |
| Lovettsville | 15 | 0.6% | 4,623 | 3.2 |
| Middleburg | 11 | 0.4% | 3,293 | 3.3 |
| Round Hill | 12 | 0.5% | 3,169 | 3.8 |
| Purcellville | 42 | 1.7% | 9,639 | 4.4 |
| Hamilton | 16 | 0.6% | 3,400 | 4.7 |
| Leesburg | 164 | 6.6% | 22,477 | 7.3 |
| Leesburg | 146 | 5.9% | 18,414 | 7.9 |
| Waterford | 21 | 0.8% | 1,213 | 17.3 |
| 663 | | 17% | | |

Figure 2-1: Chart Showing Customer Visits Per Thousand in



Figure 2-1: A Leesburg Events Non-Profit could provide a liaison for events such as August Court Days and more

- Locally owned restaurants that attract customers who could visit local shops provided the shops are open when people are downtown dining or visiting the Tally-Ho.
- The Loudoun County Courts grounds, the Town Green and the first blocks of King and Market Streets provide excellent venues for events that would in-turn create an additional reason for people to visit downtown.
- The First Friday Gallery Walk is a very important event that has succeeded in bringing people (particularly locals) into downtown on a monthly basis.
- Compared to many communities, the downtown is thriving – with a near zero vacancy rate, the downtown is populated with unique shops and restaurants.

2.1.4 Liabilities/Challenges

- The current mix of entertainment venues, shops, and restaurants does not sustain regular interaction with local residents.
- As in many traditional downtown areas, Leesburg has a combination of shop owners that are retail “hobbyists” and professional retail “strivers.” The hobbyists place a strain on retail turnover and a lack of consistency in shop hours.
- There is a lack of a variety of indoor and outdoor spaces within the downtown to accommodate a variety of events, both large and small, particularly ones that do not require the closing of major streets.
- Retail districts (outside of historic core) lack an identity and a consistent streetscape environment. Consequently, residents of the community and visitors from nearby areas can “forget” that they are in an historic community with unique character.
- East Market Street and South King Street (near Catocin Circle) lack a comfortable pedestrian environment.

2.1.5 Action Strategies

Short Term – 2003-2004

- *Create “Leesburg Events” Non-Profit Organization to Coordinate Local Events:* This group should be an independent group with leadership from the Town’s Parks and Recreation, the Leesburg Merchant’s Guild, and the Leesburg Arts Council and/or other community organizations. The future Main Street Program could be the event



Figure 2-2: Future regular events in Leesburg can be as simple as this event staged in an alley with a live performance..

coordinator for downtown to ensure that merchants are informed about upcoming events. Many communities have hired special event managers to solicit sponsorships and coordinate events with local government staff and with merchants.

- *Conduct Weekly and Seasonal Events in Downtown:* Many communities host elaborate annual events that draw thousands to downtown. August Court Days and the Flower and Garden Show are such events for Leesburg. Certainly, these events are important and should be sustained, but there is a significant opportunity to create more events on a weekly basis to attract the local population to downtown.

These events should be small and can even occur in an alley or “back parking lot”, although it is ideal to keep them as visible as possible from the adjacent streets to gain maximum exposure to the community.

The key is to host these events in intimate spaces where the event would feel crowded, even if only a small number of people attend. If the space is too large, the initial events may appear unsuccessful even if a fair number of people attend.

Small special events could also be held to bring attention to special attractions within the downtown or to bring attention to recent improvement projects. Ideas include:

1. *Grand Opening of the Town Hall “Visitor Center”* to bring visibility to the public restroom facilities that will be open on weekends and to highlight the new visitor services.
2. *“Rally in the Alley”* to call attention to and celebrate improvements to new alley spaces as the improvements are completed. Businesses immediately adjacent to the alley could be sponsors.
3. *“Light Up Leesburg”* to celebrate the installation and first lighting of the next phase of new street lights.

More short term events can be as simple as a children’s art show in downtown shops, the high school string quartet or chorus singing in the Town Green at Town Hall, or Jazz and Candlelight after work on a Friday afternoon. Some additional event tips that will be important:

1. Finish the events just in time for people to be hungry so that they dine in local restaurants.
2. Tie as many events as possible with local shops but remember that not all events will benefit all merchants. Some will only benefit a few. The ultimate goal is getting more people into downtown on a regular basis.

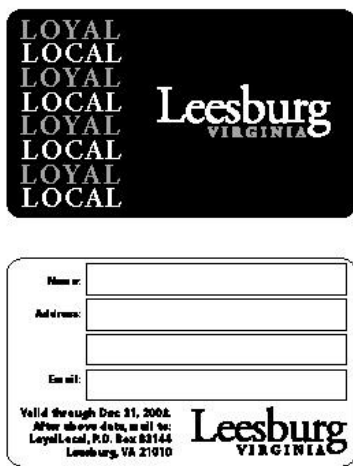


Figure 2-3: Leesburg Loyal Local Card

3. Be experimental and attempt to bring in groups that traditionally have not participated in the downtown.
- *Launch Leesburg Hometown Downtown Marketing.* In addition to events, marketing to the local community is an important step toward getting people attracted back to downtown. Local businesses should consider co-marketing themselves to the local population using a unified identity for downtown Leesburg. Fortunately, there a number of local publications that can be used to get the word out about what is going on downtown. Exhibit 2.1 shows some of the marketing material that could be developed under the Leesburg Hometown Downtown strategy.
 - *Begin Leesburg Local Loyalty Program.* Creating a “Leesburg Loyal Local” card is another way for the business community to rally itself to gain local traffic and build “brand loyalty” towards downtown. Each participating local business would choose what benefit they might offer a card holder and each would contribute a nominal fee to participate in the program in order to cover the cost of marketing and producing the cards. Local neighborhood groups should be used to help distribute the cards.
 - *Facilitate the Development of a Diverse Business Mix Downtown.* This recommendation is geared toward the Town of Leesburg and the newly created Main Street Loudoun Program. Specialty retail and restaurants geared toward a local population should be targeted for the downtown area particularly the following:
 1. Ethnic restaurants increase variety and round out the success of the restaurants already in downtown. Creating a specialty dining district is an excellent way to broaden the appeal of downtown.
 2. Entertainment venues such as a small pub, Dinner Theatre, Coffee House, or small music performance space.
 3. Consider hybrid type merchants such as Bookstore/Coffeehouses, or Pub/Jazz Clubs that will have a broad clientele creating a larger market base for such downtown.

Exhibit 2- 1: Leesburg Hometown Downtown Ad Mock Ups

Dinner and a Movie?

Remember when you could go downtown, grab some dinner and enjoy a movie in a cozy theatre. In this day and age we are battling traffic to the fast food joint for a greasy burger only to suffer in a long line at the 25 screen mega-plex. It is refreshing to know that a little bit of the past still exists in downtown Leesburg. Nearly a dozen fine restaurants offer gourmet to deli fare and you can follow your meal with a show at the Tally-Ho... back in business after all these years. Escape to a past that we haven't forgotten: Leesburg, Virginia.

Leesburg

HOMETOWN DOWNTOWN



Red Coats... and Bags.

Virginia's best kept secret is nestled away just 40 minutes from the nations capital. These streets and hills hold stories from the Revolutionary war, Civil War battles, and even saw the creation of the Marshall Plan for the reconstruction of Europe. Come share the hertiage and spirit of the founding of this nation in an oasis of historic spender. Leesburg, Virgina is waiting for you.

Leesburg

HOMETOWN DOWNTOWN



Figure 2-4: Local art can reflect the Leesburg's history

Medium Term – 2004-2006

- *Research Sites for Leesburg Center for the Arts.* A “downtown” location for a future Leesburg Center for the Arts would provide a dynamic new venue for residents to visit downtown on a regular basis and a new venue for Leesburg’s wealth of local artists to exhibit their work. Site selection should focus on identifying a location that would provide spin-off economic development opportunities and the potential to “anchor” a new district. The location should also be well-connected to the historic core of Leesburg-both visually and physically-so that patrons will be able to participate in multiple experiences (shopping, dinner, theater, etc.) without having to get back into the car.
- *Examine Opportunities for Public Art:* Leesburg is rich in the arts and history. There is an opportunity to create a public art program to add to the diversity of attractions within the downtown and as a way to bring visibility to local artists. In addition, public art could be an exciting way to interpret history. Public art projects could include:
 1. Engraved sidewalk plaques with quotes of important Leesburg residents and figures in history.
 2. Murals along blank walls, particularly in alleys.
 3. Custom-designed tree grates or ornamental banner arms.
 4. An artist-designed composition of historic artifacts along a “Trail of History”, perhaps as part of the downtown portion of the W&OD trail.
- *Enhance Existing Retail Districts:* Leesburg has thriving retail districts immediately adjacent to the historic core, however, these environments lack any kind of special identity and “sense of place.” Enhancement projects could be considered for the “Market East District” and the “King and Catoclin District” to include both public and private sector improvement projects. Area Plans for these two districts should be prepared and should address the following:
 1. *Streetscape* to enhance the visual approach into Leesburg as well as the experience of being in the district. Improvements could include the consistent use of plant material to unify the district, with emphasis on using large canopy shade trees wherever possible to help reduce the scale of the street. It will be impossible to get a uniform tree planting because of the unique site conditions on each property, however, providing trees wherever possible along the street will provide continuity. Shrub



Figure 2-5: Older commercial corridors in many cities are converting to a more pedestrian friendly scale with outdoor

planting should be emphasized to identify entrance drives and to screen parking areas. Because of the scale of the corridor, attention should be given to simple, bold masses of shrubs and hedges rather than “fussy” plant beds with many species. Streetscape improvements may also include widening sidewalks where possible, and delineating crosswalks with special paving or paint, particularly across East Market Street and South King Street. While it is not feasible to extend the brick sidewalks of the Historic Core into these districts, consideration could be given to using brick accents at intersections and key pedestrian nodes. Regardless of the type of improvements, expanding the “walk-ability” of Leesburg is important because it makes for a healthy and vibrant community.

The scope of the Market East Streetscape Project should extend from the Historic District (at Dodona Manor) to the interchange at the Route 15 By-Pass. The scope of the South King Street Streetscape Project should extend from the Historic District to the south side of the intersection with Catocin Circle. A future phase could extend south to the Route 15 By-Pass.

2. *Design Guidelines and a Design Review Process* to encourage façade improvements to older commercial buildings. Care should be given to creating guidelines that encourage improvements that are compatible to the Historic Core but appropriate for larger commercial buildings. The Board of Architectural Review and the Main Street Loudoun program can provide education and a process for local property owners.
3. *Outdoor Dining*, particularly within the Market East District, to increase the appeal of the districts for residents and visitors. Many older commercial corridors in communities are reinventing themselves as “quasi urban” areas and creating restaurant environments with landscaped outdoor dining areas and well-delineated pedestrian connections to adjacent commercial developments.
4. *Minimization of Curb Cuts* along East Market Street will help to reduce traffic conflicts, help solve traffic circulation issues, and improve the pedestrian “usability” of the town. Consideration should be given to additional opportunities for inter-parcel connections between parking lots so that some individual curb cuts can be eliminated.



Figure 2-6: New Arts Center in Downtown Frederick, Maryland

5. *Long Range Plan for Infill Development* should examine how new development (or expansion of existing businesses) can be accommodated to improve pedestrian environments and to bring architecture closer to the streets. This may include development standards that require parking to the sides and rears of buildings and require investors to provide connections to the pedestrian environment.

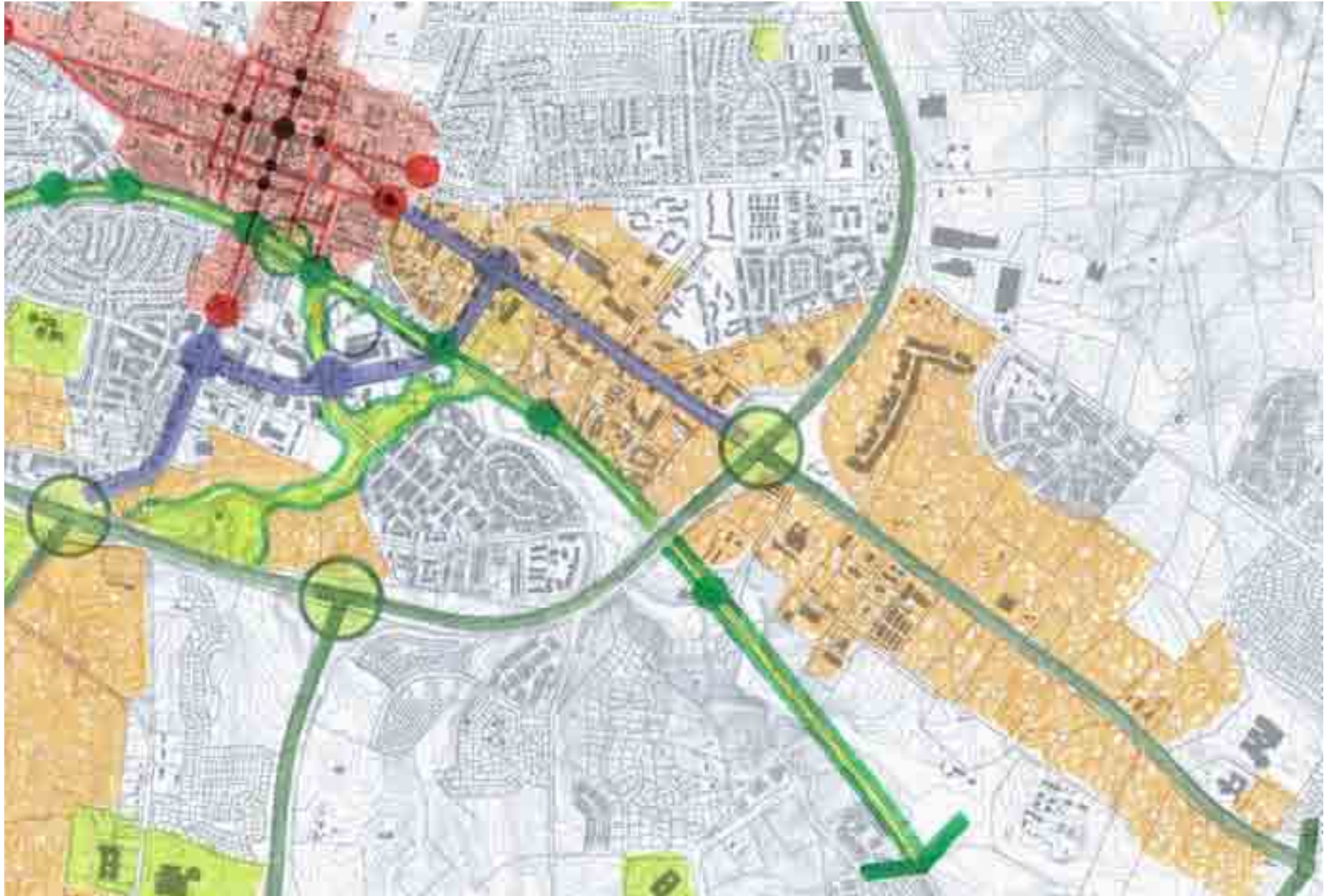
The plan in Exhibit 2.2 on page 13 illustrates the Market East area.

Long Term Recommendations – 2006-2010

These recommendations should be used as benchmarks for future development so that the community can track its success well into the future. These goals relate to fostering a long-term connection between the downtown district and the community as a whole.

- *Construct Leesburg Center for the Arts.* The arts are a key component of any successful downtown. Leesburg should be no exception.
- *Construct 30 New Residential Units Downtown.* Ultimately having more people live downtown will result in more business for downtown. Consequently, finding ways to create a diverse housing base will be important step in this direction. Of particular concern is attracting young professionals and empty nesters to alternative housing types in the downtown. The person who lives in the downtown will shop, dine, and play downtown as well. This is discussed in greater detail in section 2.3.
- *Develop a net of 12 New Retail/Restaurant Establishments.* These shops and restaurants should have an appeal to both a local and visitor market.

Exhibit 2- 2: Concept Plan Showing Market East District



2.2 The Seamless Experience: A Visitor Strategy

2.2.1 Goal

Visitors to Leesburg are presented with a unified marketing theme that will immerse them in the visitor experience. From the brochure they pick up that convinces them to visit Leesburg to the gateway signs to the visitor guide to Leesburg, a visitor should sense a “seamless” experience that clearly presents the visitor opportunities in the town.

2.2.2 Background

- Visitor media for Leesburg sends mixed messages. Being part of such a diverse county puts Leesburg in an interesting position of marketing itself as the center of a booming-high tech corridor and as a center of history and charm.
- The research conducted in the Zip Code survey indicates that Leesburg remains a highly visitor dependent but that the visitors are clearly including Leesburg as a side trip as part of a more extended vacation to the area. The evidence of this is supported in the high number of visitors from far away areas at the expense of “day trippers” from nearby areas. In fact, Washington and Baltimore accounted for very little visitor generation for Leesburg. It will be important to re-connect with these visitors particularly because the overall trends are aiming toward people making shorter trips closer to home.
- Visitors to Leesburg are not directed to the visitor resources in the community such as the Balch Library, the Loudoun Museum and even downtown. Furthermore, there is no easy-to-understand local guide to visiting Leesburg itself.
- The surrounding road network can easily direct a visitor around the greatest assets of the community without them realizing a great historic community exists. The Wayfinding Sign program solution is underway to remedy this issue.



Figure 2-7: The road network around Leesburg can easily shuttle a visitor right past the historic resources of the community without them ever

2.2.3 Assets/Opportunities

- The Historic District ambience of Leesburg is unique to the area and within easy access of a broad market.
- The area is rich in visitor opportunities from interpreting history, to shopping, to providing access to outdoor recreation.



Figure 2-8: The historic core of Leesburg is truly a unique

- The Loudoun Museum, the Balch Library, Morven Park, Balls Bluff, and the future attractions at Dodona Manor offer an unparalleled collection of visitor attractions for a town the size of Leesburg.
- There is a clear distinction of entering a “special place” upon arriving at the Historic Core from all directions.
- The Town has done an excellent job in extending the brick sidewalks of the historic core to the edge of the Historic District along South King and East Market Streets.
- Dodona Manor and areas along the Town Branch may provide opportunities for an inn and conference facility that could further enhance visitor opportunities in Leesburg.
- The W&OD trail provides a recreational attraction that could be integrated with the Town’s other attractions and its history and the Northern Virginia Regional Park Authority will be a key partner in promoting these links.

2.2.4 Liabilities/Challenges

- There is no consistent visitor-marketing theme for Leesburg. The town’s slogan “Leesburg at the Crossroads” is not the same as Loudoun County’s “Catch Your Breath” which, in turn is different from the many local venues that each have their own marketing slant.
- For those who experience Leesburg from the roadways or from perimeter areas there is no indication that a wonderful historic core exists.
- There are very few signs that direct people to the resources and districts of the community.
- Gateway treatments along all but a few approaches into the Town are lacking, particularly at the Historic Core.

2.2.5 Action Strategies

Short Term – 2003-2004

- *Develop Parking Management Plan:* Unlike many communities where parking emerged as the number one issue with many of the stakeholders in the plan interview process, parking issues for Leesburg had mixed opinions. Some interviewees felt that parking was sufficient while others felt that it was a serious issue.

Before large sums of money are spent on major new parking resources, a management plan for existing parking facilities



Figure 2-9: The Frazier Associates design for way finding sign system in Leesburg.

must be examined. A parking strategy will involve many steps. The following outlines several suggestions for a thorough parking management strategy:

- *Inventory of Spaces* – The town needs to get a handle on all of the available spaces downtown including private, public, and on-street spaces.
- *Parking Summits* – Solving parking issues will not be easy. A series of up to three bi-monthly parking summits may need to be held to test ideas and garner feedback on implementation of the strategies.
- *Firm Enforcement* – A period of zero tolerance may be necessary to begin to discourage illegal use of on-street parking spots by employees.
- *Parking Signage* – As part of the way finding system plan, new clearly marked parking signing should be implemented. Customer parking lots such as those at Town Hall should be signed accordingly.
- *Evaluation of Circulation* – Circulation through downtown should also be addressed, particularly since there have been proposals to convert Loudoun and Market street into one-way pairs. This change might increase traffic flow but it could be both devastating to businesses along those streets dependent on visibility for their survivor and detrimental for visitor traffic that is frequently confused by one-way streets.
- *Parking Pamphlet* – Many communities use a parking pamphlet distributed at stores to show parking locations.
- *Work with Private Lot Owners* – Private lot owners should consider partnering with the Town on parking issues so that resources are maximized. Many communities work out creative lease arrangements with local governments to manage downtown parking in a more efficient manner.
- *Parking Management Authority/Contractor* – A creative solution to the parking issues may be to contract parking management to a private company that will negotiate leases, make sure parking lots are clean, and manage the facilities. This would be especially important during peak usage times in the downtown.

These solutions will not solve the parking problem entirely but will improve the situation while long-term plans are made for additional parking resources.

- *Implement Way Finding System:* A way finding system has been completed by Frazier Associates and will be an

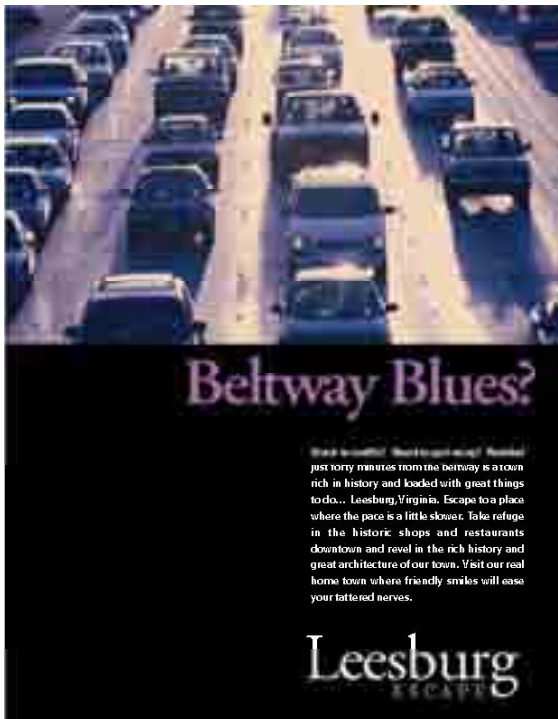


Figure 2-10: Ad mock-up showing concept for marketing Leesburg to the Washington DC market.

important component in improving the visitor experience. As mentioned before, the way finding system should be “seamless” with the overall marketing strategy presented to the community.

- *Complete Unified Visitor Marketing Material:* Leesburg itself should be responsible for developing a cohesive marketing package for the community. A comprehensive unified marketing program for the town that incorporates the Town’s website, the Airport, Ida Lee Park, the Balch Library, as well as the the business and tourism marketing encourages a sense of community and quick identity. This image, in turn, could roll into more comprehensive marketing material produced by the County and the LCVA. We are suggesting centering the campaign on the three themes of history, shopping, and outdoor adventure with an underlying theme of promoting Leesburg’s position as an ideal getaway for a day trip or weekend. A mock-up of the concept is shown in Exhibit 2.3.
- *Launch Marketing Geared at DC Metro Area:* Leesburg should make a special effort to re-attach itself to the DC metro area by producing bold marketing to this important population segment. The “Beltway Breakaway” is a pocket guide to Leesburg that could be distributed to visitors to the area. Selective ad placement in the DC market should also be considered to attract visitors from this area. Figure 2.11 to the left and Exhibit 2.4 illustrates some of the concepts for the visitor marketing strategy.
- *Develop the Program for the Leesburg Resource Center:* A key recommendation of the report is the creation of a “one stop shop” for visitors, investors, and residents to Leesburg. This “Leesburg Resource Center” would provide visitors with a place downtown to pick up brochures, get tour information, and use public restrooms. The Leesburg Resource Center would be an ideal component of an expanded town hall on Loudoun Street for several reasons:
 1. The Leesburg Resource Center could be designed to complement and respect the adjacent historic architecture and to have a strong relationship to the street and the pedestrian environment. This would be a great way to “lead by example” for the private sector.
 2. The Center would be adjacent to the Loudoun Museum which could produce some excellent synergy with the existing programs of that facility.
 3. The Center would be convenient to parking at the garage and close to the existing town hall.

Exhibit 2- 3: Mock up of the Beltway Breakaway Visitor Pocket Guide


| | | | | | |
|--|--|--|--|--|--|
|  | |  | |  | |
| Beltway BREAKAWAY | | Great Adventure | | Reliving History | |
| Leesburg VIRGINIA | | Leesburg VIRGINIA | | Leesburg VIRGINIA | |
|  Great Adventure Page 3 | |  Shop 'til You Drop | |  Lightfoot Cafe | |
| Shop 'til You Drop Page 5 | | Reliving History Page 8 | | Lightfoot Cafe 29 West Market Street Leesburg, Virginia 20176-2805 ph. 703-771-2233 Lightfoot Cafe is a place that dishes up American an emphasis on pasta, salads and drinks. Expect the average entrée to cost between \$10 and \$20. Details to Note: Carryout is available. | |
| Leesburg VIRGINIA | | Leesburg VIRGINIA | | Leesburg VIRGINIA | |
| STOP #14 | | STOP #14 | | STOP #14 | |

Exhibit 2- 4: Mock Up Ads Geared toward the Washington DC Market




Get Out Now, If You Can.

Stack in traffic? Need to get away? Hunkered just forty minutes from the beltway is a town rich in history and loaded with great things to do... Leesburg, Virginia. Escape to a place where the pace is a little slower. Take refuge in the historic shops and restaurants downtown and revel in the rich history and great architecture of our town. Visit our real horse town where friendly smiles will ease your frustrated nerves.

Leesburg

ESCAPE



Capitol Punishment

Living in the DC area has its frustrations. Yet, less than an hour from the hustle and bustle of the city is a place where rolling farms lead to a village full of history. Leesburg, Virginia offers dozens of antique shops, award-winning restaurants, several great museums, and blues on the Green every Friday night! Come see why we are a little bit of clumncy in a sometimes cruel and unusual place.

Leesburg

ESCAPE

4. Windows and space planning could be designed to make the activities very visible from the street and to encourage visitor and community utilization of the facility.

Additional uses for the Leesburg Resource Center will be discussed in section 2.6.

Medium Term – 2004-2006

- *Develop Co-Op Marketing Strategies for Dodona Manor, Morven Park, Balch Library, Loudoun Museum:* Once the unified visitor marketing pieces are launched, opportunities for co-marketing with other major facilities in Leesburg can be examined. Over time this could save each organization money while continuing to foster a unified marketing vision for the town.
- *Facilitate Public Private Venture with Dodona Manor on Market East Improvements:* While all of the gateways in to Leesburg and its Historic Core are important, the Market East Gateway is particularly important because it is one of the most prominent approaches into the Historic District and because it is adjacent to the Dodona Manor. Dodona Manor has tremendous opportunities as a visitor amenity for Leesburg that include a wide variety of visitor oriented services and amenities. An improved gateway would increase the visibility of both the District and Dodona Manor. These improvements are covered in section 2.1 of this report. These improvements should be completed after a master plan for the area is developed.
- *Create a Hierarchy of Gateway Treatments:* Create new gateways throughout the Town to delineate Town Boundaries, Gateway Corridors, Interchange Gateways, District Boundaries, and Historic Core Boundaries. Specifically, gateways should include:
 1. Town Boundary gateways identify entrances into the Town corporate limits. Because the political boundary of a community often does not occur at the same location as what “feels” like a gateway into a new place, such as along Route 7 coming from the East, these gateways should be comprised primarily of a sign. Town Boundary Gateways should be identified along Route 7 coming from the east and west, Route 15 coming from the north and south and along the Greenway.
 2. Gateway Corridors occur over a distance rather than just at one geographic point. Gateway corridors are an opportunity to provide visitors (and residents) with a positive experience upon entering Leesburg. Because

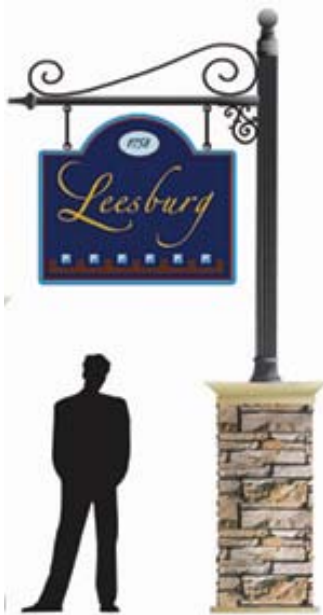


Figure 2-11: Examples of gateway treatments for districts and the town itself as developed by

these corridors are primarily along major roadways, the design treatment needs to reflect the large scale of these spaces as well as the traffic speeds. The design treatment could include landscape improvements (bold and simple), protection of existing landscape environments, and high quality development that follows development guidelines and design standards.

Corridor Gateways should be considered for:

- Route 7 (from the eastern Town boundary to the Route 15 Bypass),
 - Route 7 from the Route 15 bypass to Dodona Manor.
 - Route 15 north from the bypass split to the historic district
 - Route 15 South from the historic district to the bypass
 - The bypass (entire length)
 - The Dulles Greenway
3. Interchange Gateways are comprised primarily of landscape and should not include signage. The land associated with interchange ramps provides an excellent opportunity to provide bold sweeps of color and a unique identity for a community. The planting design should focus on native plants and a simple palette to avoid high maintenance.

Interchange Gateways should be considered for:

- Route 15 North/Bypass Split
 - Bypass/Battlefield Blvd. (Future)
 - Bypass/Route 7 East
 - Bypass/Dulles Greenway
 - Bypass/Route 15 South
 - Bypass/Route 7 West
4. District Gateways should be comprised of signage, low walls and landscape (scaled to vehicular traffic) to announce the arrival to specific districts within Leesburg.

District Gateways should be considered at:

- South King Street/Catoctin Circle (King and Catoctin District)
- East Market Street, just west of Bypass (Market East District)

- South Harrison Street/Catoctin Circle (Future Crescent District)
5. Historic District Gateways should be comprised of signs compatible in design to the historic district architecture, scale and character.

Historic District Gateways should be considered on:

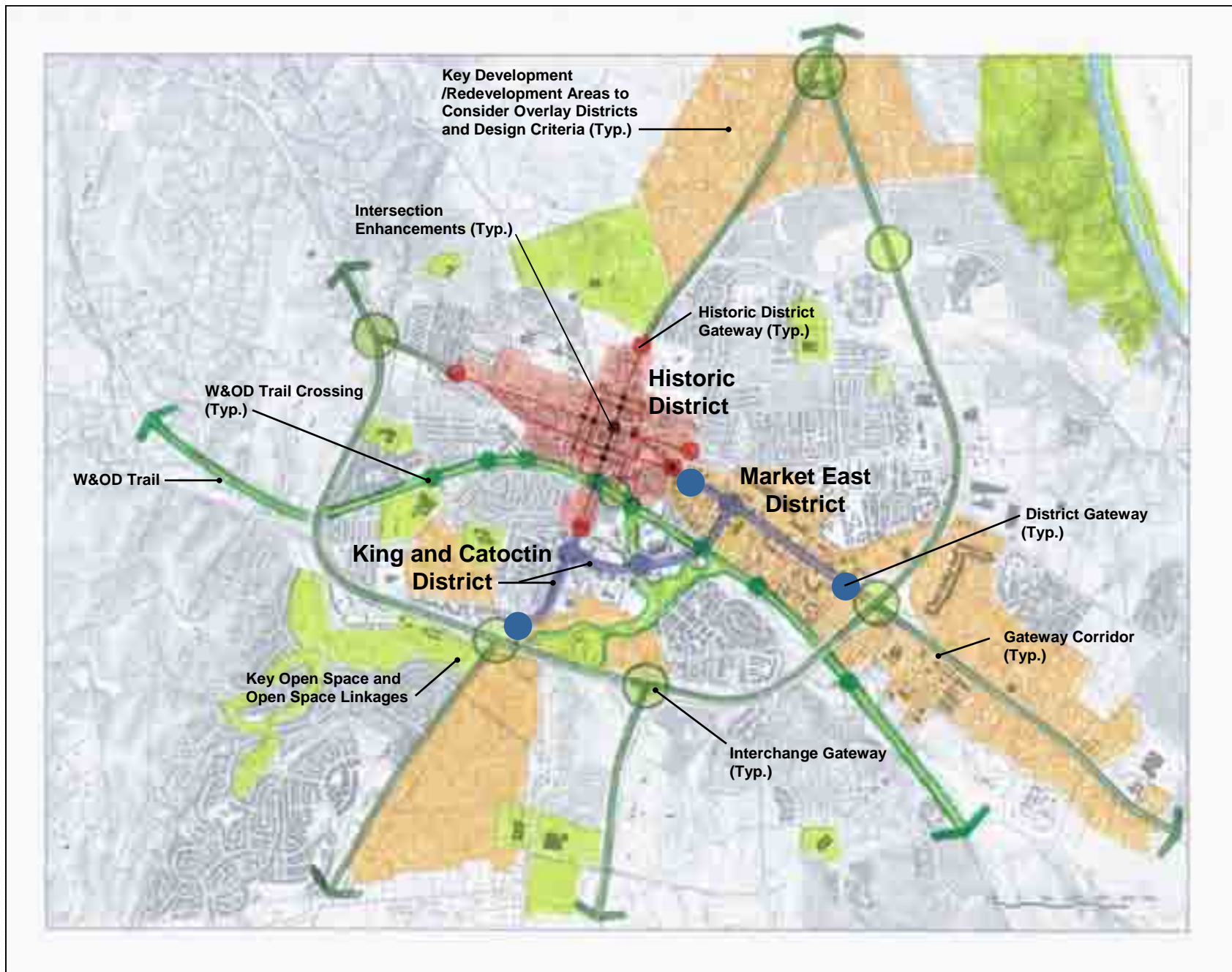
- East and West Market Streets
- North and South King Streets
- Harrison Street
- Edwards Ferry Road

These gateway improvements are illustrated in Exhibit 2.5 on page 23.

Long Term Recommendations – 2006-2010

- *Route 7 and King Street Enhancements:* These improvements are discussed in section 2.1 of this report.

Exhibit 2- 5: Town wide Map Showing Gateway Improvements and Street Connections.



2.3 Expanding Downtown: Crescent District and Market East

2.3.1 Goal

A chief objective of the business development strategy is to create additional areas to obtain economic development in Leesburg particularly in areas adjacent to the historic downtown that may be underutilized. The goal then becomes to enhance the town by creating new development areas that can reinforce existing neighborhoods while creating new investment.

2.3.2 Background

- Downtown is currently a vibrant district with many occupied shops and restaurants. In fact, the occupancy rate of downtown Leesburg exceeds that of many communities.
- There are areas adjacent to downtown, however, that are underutilized and have not traditionally been thought of as “downtown.” These areas which are near Town Branch and King Street and near Dodona Manor are prime opportunities for investment.
- Creating opportunities for these areas to flourish will reinforce downtown businesses, create new places for businesses to locate, and develop some diversification of businesses and uses. In fact, residential development should be a primary consideration for locating inside these areas.



Figure 2-12: There are several properties adjacent to Town Branch and the W&OD Trail that could, over time, be converted

2.3.3 Assets/Opportunities

- Several assets converge near the southern edge of downtown along Town Branch, which could transform from a flooding problem into an eventual water feature for the community. These include: Raflo Park, the W&OD Trail, the Historic District, the Barber and Ross property, Brandon Park, The Skate Park, and access from Catocin Circle via Harrison Street.
- The W&OD Trail itself is a significant generator of visitor traffic for Leesburg and a keystone for future investment.
- Dodona Manor owns significant properties along Route 7 and Market Street in downtown. Having major properties under one owner makes development scenarios in urban settings much less complex.



Figure 2-13: Several key assets come together in the Town Branch Crescent District including Raflo Park, the W&OD Trail and Harrison Street which connects Catoctin to Market Street in Downtown.

2.3.4 Liabilities/Challenges

- Flooding needs to be addressed along the Town Branch
- Land adjacent to Town Branch is underutilized and presents a “back door image” to the Historic District from South King St.

2.3.5 Action Strategies

Short Term – 2003-2004

- *Begin to Explore Development Opportunities Along Town Branch:* The key to any successful redevelopment project is seeking the cooperation from as many property owners as possible. An initial step in the effort will be to contact key property owners along Town Branch to identify those who might have an eventual interest in being part of the planning effort. Not every property owner will want to be a part of the plan immediately (some will not participate for a long time). In any event, an effort should be made to identify those who will be cooperative and work with them. While this effort is going on, potential obstacles and opportunities should be identified including flood plain limitations, contamination, and the planned channel improvements currently underway.
- *Develop Master Plan for Crescent District:* The District boundaries (for study, not necessarily revitalization) should include two areas. Area one should extend from Royal Street to Monroe Street and from Liberty Street to Harrison Street. Area two should extend from Raflo Park to Industrial Ct. and from the property north of the W&OD trail to Catoctin Circle.

The goals of the master plan should be to create a front door for the historic district. Buildings should front onto the Town Branch, provide opportunities for mixed-use development oriented to the existing streets and open space amenities, address flooding concerns for Town Branch, and integrate a pedestrian amenity that links into the W&OD trail as well as the Town’s open space and trail system. The master plan should be an illustrative site plan showing potential building placement, parking and linkages to adjacent properties, neighborhoods and amenities, schematic design for the Town Branch pedestrian amenities, and an outdoor events space.

Additional work on the plan might include a financial plan that can outline what roles the public and private sectors will play in developing the project as well as a request for development proposals that could be used to solicit interest in

the project. Exhibit 2.6 on the following page shows a conceptual plan that would precede the detailed master plan.

Exhibit 2- 6: Town Branch Crescent Concept Plan

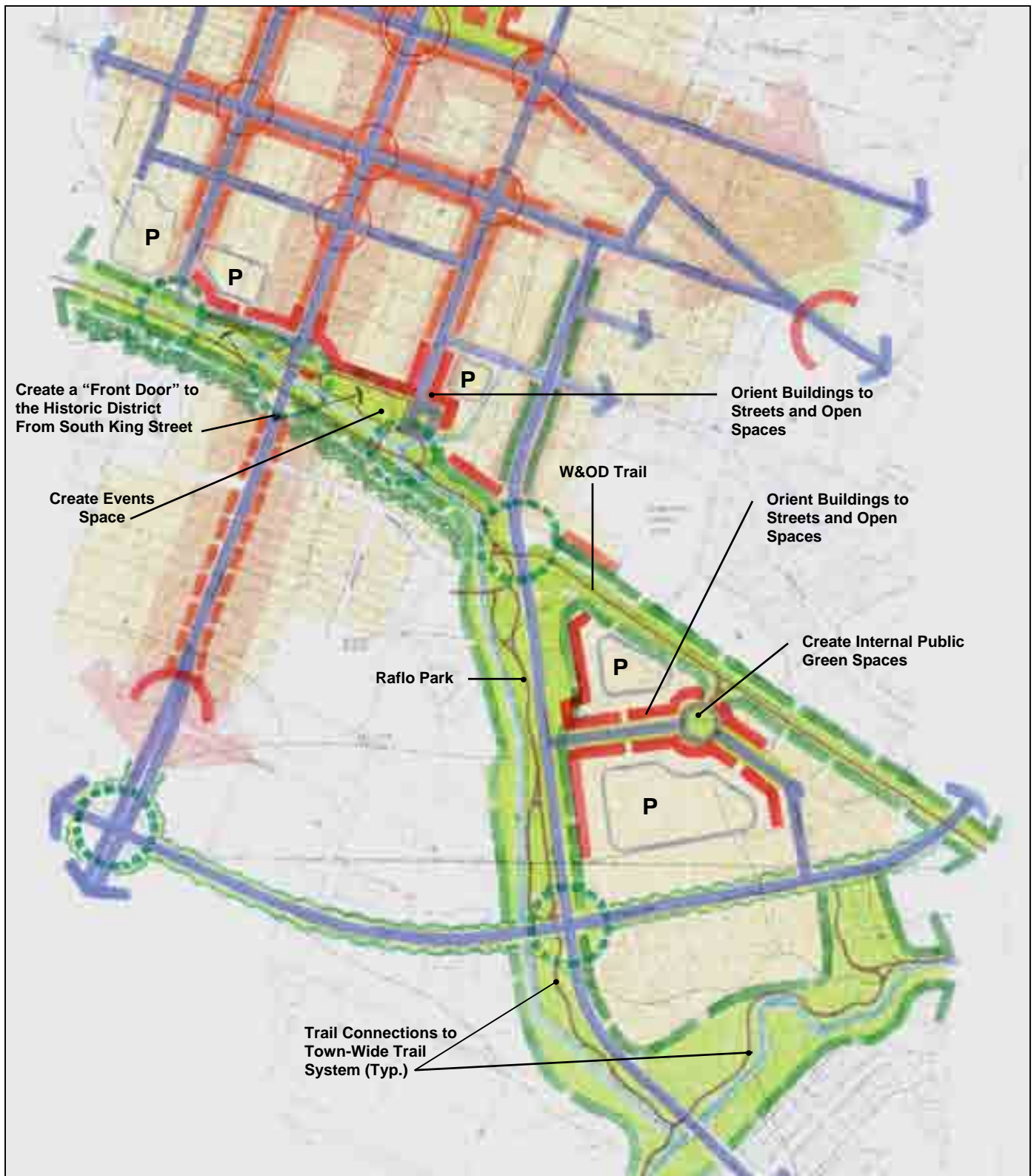




Figure 2-14: The Market East District can emerge as one of Leesburg's premier destinations with the development of the Dodona Manor holdings.

- *Develop Master Plan for Market East District:* The town should consider either an additional planning process for the Market East District or an overall master plan stretching across the Town Branch Crescent over to Dodona Manor and its holdings at Market Street. This plan would involve the following key steps:
 1. *Establish Task Force* of Town staff, Dodona Manor, and property owners to determine the scope of the gateway plan.
 2. *Prepare Area Plan and Design Concept.* While the exact scope should be determined by the Task Force, the plan should include signage for the historic district and the Dodona Manor, well-defined pedestrian crosswalks, landscape enhancements, and development/redevelopment guidelines for the properties located within the Market East Gateway.
 3. *Dodona Manor Development Program.* A program for properties included in the holdings of Dodona Manor needs to be component of this effort. A truly cooperative master plan will produce the most beneficial results for both the town and Dodona Manor.
 4. *Phase Implementation* so that the recommendations can be put in place over time.
- *Recruit and Promote Quality Infill Development along Loudoun and Market Street:* The potential for the town to support additional specialty retail, residential, and office development along Loudoun and Market Streets is evident in the market analysis of the community. The town should actively work with investors and the real estate community to promote properties in this area.

Medium Term – 2004-2006

- *Develop Detailed Design for the Leesburg Crescent Pedestrian Amenities and Construct Phase I.* The first phase of the pedestrian improvements should extend from Georgetown Park to Raflo Park. Designs should include lawn areas, tree planting and expanded paved areas for events and gatherings. Particular attention should be given to the bridge structures and the pedestrian crossings of South King Street and Harrison Street. These intersections present an opportunity to increase visibility of the riverwalk and the W&OD trail.
- *Explore Creating a Tax Increment District in Downtown:* Tax Increment Financing is provided under the Code of the Commonwealth of Virginia in section 58.1-3245. It enables



Figure 2-15: Example of a public/private venture project along the Reedy River Greenway in Greenville, SC. This development has three restaurants, six retail spaces, a gym, and office space for four

any County, City, or Town in the Commonwealth to declare a redevelopment area and issue revenue bonds on the incremental increased value of property within that district in order to fund improvements to that district. This has been a very successful program in many states and the City of Virginia Beach has developed a district to fund major improvements to their downtown area. This is an exciting technique that allows the community to issue bonds for development without impacting the taxes of property owners outside of the natural increase in values generated by development.

- *Explore Public/Private Ventures to Begin Development of Districts:* Public private ventures will be an important component of future investment in Leesburg and the Town should take a proactive stance in seeking such ventures to further enhance the tax base and encourage sensitive investment inside these districts. Each effort should be carefully scrutinized to ensure that the town is maximizing its investment and minimizing risks to taxpayers – all while enhancing the quality of life for the community.

Long Term Recommendations – 2006-2010

- *Construct Phase II and III of Leesburg Crescent Public Improvements:* The public improvements in the Crescent District will be a multi-year project that will involve a number of stakeholders both public and private. The later phases of the project will become more apparent in coming years but should be approached in a phased manner preferably in conjunction with private investment.

2.4 A New Market for Leesburg: Live/Work/Play

2.4.1 Goal

Leesburg is easily accessible to the Washington (and Baltimore) market. It provides a relatively affordable location for small business in a striking historic setting. As a result, Leesburg should concentrate its economic development activities on entrepreneurship becoming known as the Washington, DC region's premiere location for small businesses to grow and thrive.

2.4.2 Background

- Many interviewees expressed the strong need for Leesburg to continue to remain a community balanced in its focus by concentrating on business development that will maintain the tax base, provide jobs for local citizens, and create a well rounded community.
- Downtown is already supporting a thriving small business community in addition to the businesses typically found in a "courthouse" town.
- Leesburg, both in downtown and throughout the community, is limited in its offerings of sites for new business development or existing business expansion. Business retention and expansion represents the most important aspect of economic development.

2.4.3 Assets/Opportunities

- The Crescent District presents an opportunity to create new infill housing and "live work" space that broadens the housing product type and increases the market for nearby businesses and recreational amenities.
- A growing network of small businesses has located in downtown that will provide a base for future business expansion.
- Nearby universities and educational facilities such as Dodona Manor offer opportunities for partnerships for future economic growth through future research and education facilities that would spur business development and investment. These might include education, conference facilities, hotels or inns, and research institutes.



Figure 2-16: Live/Work Spaces such as these in Memphis, TN are one of the newest and most interesting forms of urban housing. Note the small grocer in the foreground.

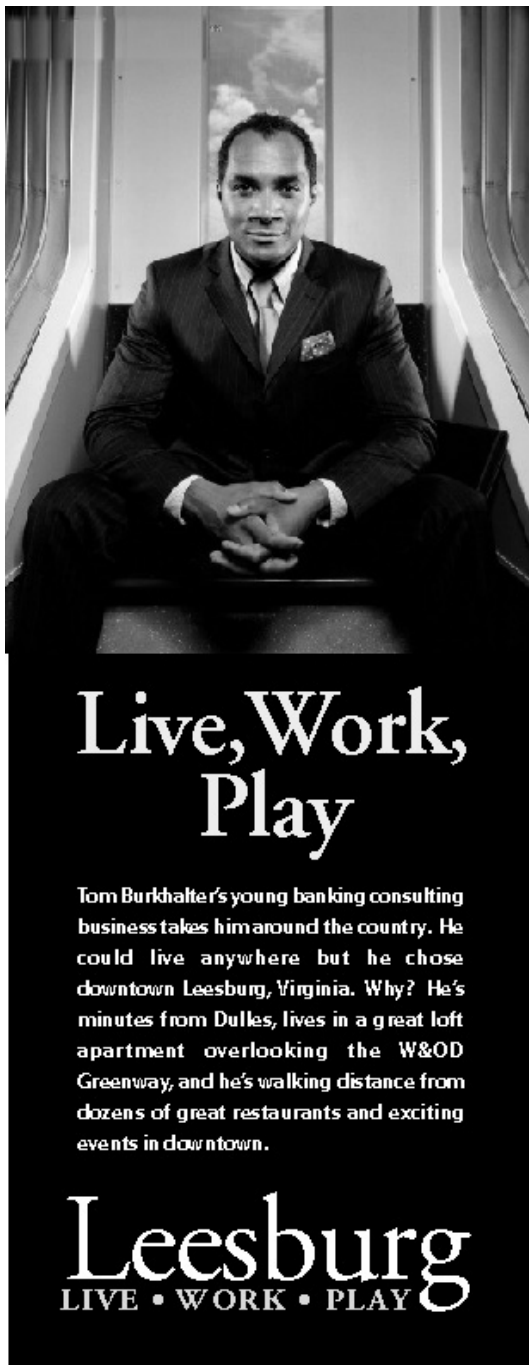


Figure 2-17: Mock-up of advertising concept that could be used to recruit entrepreneurs to Leesburg.

- There is land available for potential economic development that has the opportunity to be made “development ready” with the infrastructure in place for development to occur right away.
- Several parks, the W&OD trail, and a comprehensive master-planned greenway system provide a wide range of recreational opportunities for in-town residents and the opportunity to create a first class park system that is appealing to people looking for an amenity rich community and a healthy place to live.

2.4.4 Liabilities/Challenges

- Downtown Leesburg lacks a diverse residential product, particularly for young professionals and empty nesters who would like the excitement of living in town but who cannot afford or do not wish to maintain a single family home. There are currently very few over-shop flats, lofts, or townhouses that offer a variety of housing types.
- The need for public transportation between the historic core and other parts of the community will grow as traffic congestion becomes more pronounced.
- Office space in Leesburg is very limited. There are only a few speculative office buildings particularly in the downtown area.
- Larger industries and offices in Leesburg are severely limited in their choices for expansion space in Leesburg. (New businesses face the same dilemma.)

2.4.5 Action Strategies

Short Term – 2003-2004

- *Launch Marketing to Recruit Entrepreneurs to Leesburg:* Targeting entrepreneurs to the community will be an important early step in the process. Leesburg already has the amenities to attract small business and this should be marketed immediately. The sample ads to the left show what these marketing materials could look like.
- *Conduct Targeted Industry Study:* In addition to simply marketing to business, Leesburg should further examine the industrial and professional business prospects that will be most suited to the land availability, lease space and existing business sectors available to the community. Such a study would help Leesburg further understand and support the

efforts to locate Bio-technology to the area as well as the regional examination of security-based industry.

- *Market Upper Floor Residential and Infill Opportunities for Additional Residential Downtown.* With a few good exceptions, much of Leesburg's residential development reflects suburban style site planning with broad streets, curvilinear roads, cul-de-sacs and rear yards that face onto major roads. Partnering with quality land developers and facilitating creative development solutions would allow the Town to develop a diverse housing stock that includes:
 1. Upper Floor Residential, primarily above shops and businesses within the historic core. Even communities without as much activity as Leesburg have been successful at marketing upper floor residential to a select clientele that find urban environments an exciting alternative place to live.
 2. Infill Single Family, developed on small lots with architectural styles compatible to the Town's historic residential architecture. Homes should face the street and site plans should, where appropriate, utilize neo-traditional design principles to respond to the surrounding context, providing connectivity to the overall street and open space system. The "Leesburg South" area presents an outstanding opportunity to develop some new residential development using neo-traditional principles.
 3. Multi-Family Housing, developed with 3-4 floors of apartments in buildings that face onto and define streets and open spaces. The architecture should be articulated to reflect the Town's historic architecture and to divide the overall building mass into smaller components.
 4. Live/Work Space, developed with ground floor space for start-up businesses. This has become the latest in a growing trend of urban housing that offers residents a chance to have an office or studio on the ground floor with living above.
- *Complete and Connect Town Wide Greenway System:* The Town's Department of Parks and Recreation has recently completed a Comprehensive 20-Year Parks, Recreation, Open Space, Trails, and Greenways Master Plan. The master plan identifies a number of trail connections to provide greater connectivity among existing parks, future parks and neighborhoods. While all of the trails identified should be constructed in the future, several, in particular, should be



Figure 2-18: Diagram showing potential greenway connections

considered priorities as they will help to reinforce many of the strategies in this Business Development Plan. These include:

1. South Harrison Street, South King Street and Tuscarora Creek Greenway Trails will complement the Crescent District redevelopment and provide linkages among Downtown, the Crescent District, Raflo Park, Brandon Park, Izaak Walton Park and the “Westpark” site.
 2. Fairview St. and Catocin Circle Trails will complete the connection between Ida Lee Park and the W&OD Trail.
 5. Dry Hollow/Balls Bluff Trail will complete the connection between Balls Bluff and Ida Lee Park.
- *Begin “Business Development Network” Under The Economic Development Commission:* The Town should engage the business community in regular dialogue both to hear the opinions of business leaders and to network on future opportunities. The Business Development Network should involve between key small business leaders and professionals in the community who get together with the EDC on a regular basis. The scope of the Business Development Network would be:
 1. A sounding board for town issues facing the business community and the environment for business in Leesburg.
 2. A vehicle through which the town can offer training, bring in professionals, and assist small businesses on day-to-day matters that they might not have access to otherwise.
 3. A line of communications through which small business issues can be heard and opportunities can be followed.
 4. From time to time the Small Business Council might be called on to endorse particular issues that the Town Council is considering that would enhance the business environment in the community.

The Business Development Network will be a critical step in moving toward a more pro-active relationship with the business community.

Medium Term – 2004-2006

- *Begin Assembling Property for Industrial/Business Development & Expansion:* The issue of balanced land uses and economic growth in the community rests on the ability of the town to have property available for business development and expansion. More and more, businesses are looking for “development ready sites” for investment. Leesburg should strongly consider creating a business park that would provide



Figure 2-19: Illustration of an in-fill townhouse development similar to what might occur along the Town Branch Crescent.

the infrastructure to accommodate expansion of local business and new industrial recruitment to the community.

- *Partner With Residential Developers to Facilitate Creative Residential Development in the Crescent District and Throughout Leesburg:* The town may find that it will need to take a more proactive role with the development community to ensure that housing opportunities marketed in the first steps above are developed in a sensitive manner.
- *Incorporate Mixed-Use Districts and Higher Density Residential Development Opportunities Into the Town Plan:* The town plan is slated for an update in the coming years. This will be an ideal time to present creative ways for higher density residential and mixed use development to have a prominent role in the plan.
- *Explore Uses for the “Westpark” Site for Business/Conference Facilities:* The current owners of the Westpark site have no immediate plans for changes. However, the town should explore working with these property owners in the future on creative uses for the site including professional conferencing facilities, a small business incubator, or even a small office park development. Any development on the site should be planned to allow for the development of the Tuscarora Creek Greenway Trail which, in turn, would tie in with the overall greenway network and connect the site with downtown. Ultimately, the Town may want to consider a public use for this property such as a public golf course, research center affiliated with a University, or conference facility.
- *Continue to Support Leesburg Executive Airport:* The events of 9/11 have resulted in an unprecedented boom in charter and private aircraft travel. These trends aren’t likely to reverse in the coming years. As a result, the town’s control of the Leesburg Executive Airport places it in a very strategic position. Expansion plans may need to be considered in the future as the town maintains this facility as one of its key economic development recruitment tools for new companies and as a potential generator for tourism revenues. According to a demographic snapshot of Flying Adventure magazine readers; the average income for users is \$387,500, 76% own second home, 88% own additional real estate, 93% are business decision makers.

Long Term Recommendations – 2006-2010

As indicated before the following are presented as benchmarks for future development.

- *Create 1000 New Business Related Jobs in Leesburg*
- *Recruit 7 New High Quality Businesses/Industries to Leesburg*

2.5 Leesburg Heritage: Celebrating and Preserving Character

2.5.1 Goal

Leesburg's unique historic character is perhaps its greatest asset. Leesburg has a distinct opportunity to turn this asset into a means for future success if the community recognizes that its preservation efforts could make it a national destination for preservation and heritage tourism.

2.5.2 Background

- Leesburg has done an admirable job of preserving the architectural integrity of downtown. These preservation efforts are apparent by the fact that downtown has nearly 100 percent first-floor occupancy.
- Many interviewees expressed frustration with the process of going through design review suggesting that the business community and the preservation community in Leesburg can improve relationships toward a common goal.

2.5.3 Assets/Opportunities

- The existing town character in downtown is excellent.
- The Town of Leesburg has succeeded in attracting a number of grants for additional historic preservation efforts.
- Additional marketing of Historic Preservation through the Main Street Loudoun program, the BAR and the growing interest in preservation will continue to focus attention on this asset.
- While some "clutter on the sidewalks" poses challenges with pedestrian traffic, for the most part, the signs, furniture and display of goods adds to the vibrancy of the downtown.
- Recent efforts such as the Courthouse Square landscape improvement project continue to enhance downtown and its historic environment.
- Leesburg's deep roots in military history from the Revolutionary Era to the Civil War continuing on through World War II and European reconstruction represent an incredible opportunity to increase heritage tourism activity in the community.



Figure 2-20: Downtown Leesburg's rich historic

2.5.4 Liabilities/Challenges

- The current design review process is viewed by many interviewees as onerous and sometimes unfriendly.
- Continued pressure for growth will present challenges in preserving the architectural integrity of downtown.
- Many parts of Leesburg outside of the historic district do not reflect the integrity of the core. The scale of Leesburg's quaint downtown is contrasted by the shopping malls and suburban residential development of recent years creating challenges from both preservation and marketing perspectives.

2.5.5 Action Strategies

Short Term – 2003-2004

- *Distribute Brochure Detailing the Basics for Development in the Old and Historic District:* A simple brochure detailing the steps necessary to make changes in the Old and Historic District should be actively distributed to all property and business owners inside the district.
- *Host a "Preservation Forum" with the Community to Educate and Examine Preservation Issues:* The Board of Architectural Review is a regulatory body for the Town of Leesburg. An equally important function of the Board is to educate the community on the importance of preservation.

Consequently, the Board should host a preservation forum or series of forums where issues are discussed. The Forum would provide a vehicle through which:

1. Citizens and members of the Board of Architectural Review can share concerns about the process in a non-adversarial manner (possibly through a facilitator).
2. The Board can bring in preservation experts to explain the financial benefits of preservation. In fact, some recent studies have provided definitive evidence that local design review increases property values and stabilizes neighborhoods.
3. The Board can share techniques and "tricks of the trade" that it has learned to help property owners adhere to the guidelines.

Ultimately, this forum could become a series of seminars on preservation that are offered twice a year as part of the service that the Board of Architectural Review provides to the property owners of Leesburg. While property owners will be

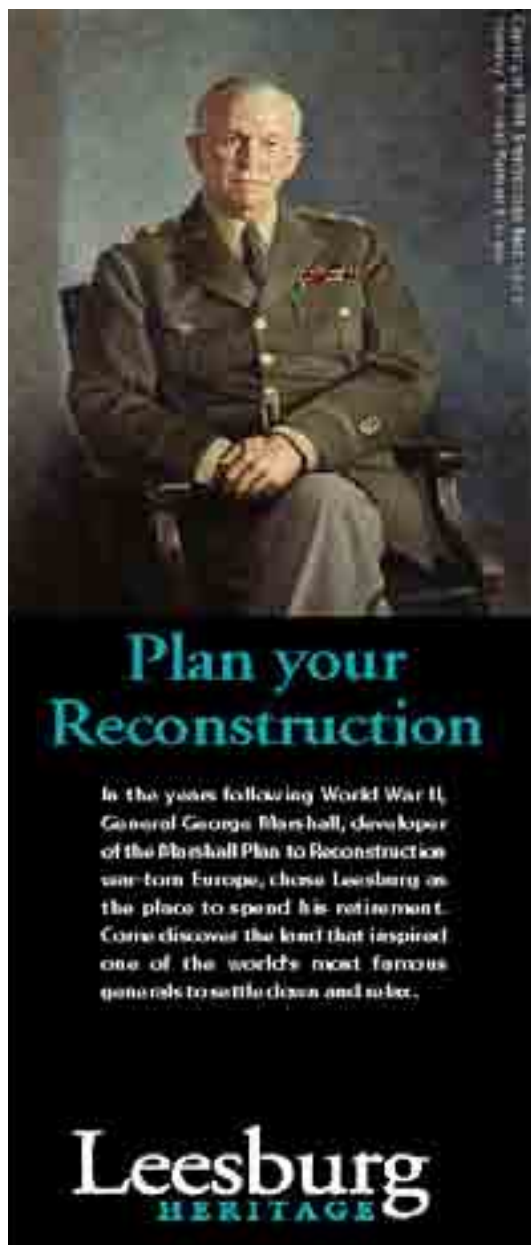


Figure 2-21: Ad Mock-Up showing the potential to market Leesburg's association

the primary audience, these forums should also involve local realtor's associations as well as developers wishing to invest in the historic district.

- *Create the "Development Preview Team" to Assist Investors on Improvements:* A key issue that arises in any community is the regulatory process that governs building permits. Leesburg is no exception. One very effective tool that has been implemented in other communities is a "Development Preview Team" that brings zoning officials, building codes officials, and even staff of the Board of Architectural Review into the development process prior to an owner submitting for a building permit. The team would:
 1. Be available by request of the property owner as a service provided by the Town of Leesburg.
 2. Provide advice for the property owner in the form of an advance team site visit to review key renovation issues.
 3. The team would develop a "key issues summary" that would be provided to the property owner as a service.

Ultimately, this process could save both the property owners and the Town of Leesburg time in the formal regulatory process and create a spirit of cooperation between the Town and the development community. Additionally the development team could foster improved working relations among town staff.

- *Create a Leesburg Heritage Tourism Marketing Package:* After beaches and shopping, visiting small towns and historic sites ranks three and four in top vacation activities for Americans. In fact, heritage tourism is one of the fastest growing segments of the visitor market. In conjunction with the overall visitor strategy outlined in section 2.2 above, a focus on heritage tourism should be developed. The package should clearly explain Leesburg's role in the American Revolution, in the Civil War, and in post World War II as luminaries from across the globe came to visit George C. Marshall at Dodona Manor. This may be an effort that can be coordinated with the Loudoun Heritage Consortium.

Medium Term – 2004-2006

- *Develop Façade Grant and/or Landscape/Parking Improvement Grant for Property Owners:* The Town should consider creating a mini-grant program for small business owners in key areas where the Town wants to see quality investment. This program would be a matching grant program specifically targeted to certain areas. Of particular concern



Figure 2-22: Example of an enhanced alleyway with gateway treatment, mural, and special pavers

will be creating opportunities for property owners to provide trees and landscape where possible. In particular, surface parking areas should be screened with a low hedge or ornamental wall/fence.

- *Expand/Enhance Existing Streetscape:* For the most part, streetscapes in the core are successful because of the brick paving and the architecture that defines them. While extensive streetscape improvements are not needed in the historic core, additional focus should be considered for the following:
 1. Enhanced Alleys, to improve the pedestrian experience between the streets and the rear lot parking facilities. Alley improvements could include special paving (pre-cast pavers or stamped concrete), ornamental lighting (wall-mounted or free-standing), ornamental gateway signage and a mural program for blank walls.
 2. Continuation of Ornamental Street Lights to eventually include all of the streets within the historic district.
 3. Enhanced Crosswalks at major intersections within the historic core using brick pavers or other surface treatments to visually extend the sidewalks across the street.
 4. King and Market Intersection Treatment to provide visual prominence to this intersection and to provide traffic calming. Stamped concrete could be used to replicate a cobble pattern in the intersection area defined by the crosswalks.

Long Term Recommendations – 2006-2010

- *Continue Streetscape Enhancements:* Streetscape enhancements will be a long term goal of the community and will need to be evaluated on a yearly basis for improvements.

2.6 Getting the Job Done Organizing for the Future

2.6.1 *Goal*

The Town of Leesburg is poised to handle future development and become an active partner in public private ventures for Economic Development.

2.6.2 *Background*

- Local governments generally fall into two camps when it comes to fostering development. The first is a community that reacts to development proposals as they arise and provide the typical regulatory oversight for that development. The second type of community aggressively works to promote plans that make sense and actively works with the private development community to see to it that the plans are implemented. Leesburg traditionally has been in the former camp.
- Increasingly, investors are seeking creative partnerships with the public sector to ensure the success of their projects. The day of the public/private venture is alive and well.
- If the Town of Leesburg wants business development, it must take a proactive approach. This is important not only from a jobs/housing balance standpoint but also from a fiscal standpoint. The residential land area of Leesburg is seventy-five percent built-out while the commercial land area remains forty percent built-out. Preserving commercial land in a climate of intense pressure for residential development will be critically important.

2.6.3 *Assets/Opportunities*

- The Economic Development Commission has taken a very proactive role in the development of the community.
- Economic Development staffing is now covered with the hiring of a new director.
- The creation of a Loudoun County Main Street program will further enhance the resources available to the Town.

2.6.4 *Liabilities/Challenges*

- Without a unified plan for business development, the Town has been easily “distracted” with various proposals and projects that arise creating a somewhat disjointed focus and approach to economic development. New proposals will

certainly come in the future but the Town can now evaluate these proposals as they fit into the overall business development strategy.

Short Term – 2003-2004

- *Establish Downtown Manager Position:* This recommendation involves shifting the responsibilities of the Tourism Coordinator to becoming a Downtown Manager. Very few of the actual job description items should change. A focus should be placed, however, on having the Downtown Manager coordinate the marketing strategies presented in this report, provide staff support for the Merchants Guild recommended below and work with the Economic Development Director on future projects for downtown.

A large portion of this plan is devoted to marketing the downtown and community to Leesburg citizens, business owners, potential residents, and visitors. This position is critical not only in meeting the marketing goals of the plan, but also represents a key organizational component of implementation.

- *Focus EDC on Town-Wide Development Policy, Infrastructure, and Business Relations:* The Economic Development Commission has been a guiding force through the creation of this report and represents a remarkable assembly of public and private leadership in Leesburg.

The EDC's role will continue to be the voice of the business community to the Town Council by suggesting to the Council ways to improve the business environment. A longer term initiative of the EDC will be to focus on infrastructure development for future economic development efforts particularly on making sure land is available that can accommodate this growth.

Over the next six months, the Economic Development Commission should complete several tasks:

- Representatives of the Commission should be available to present the plan to various boards and commissions such as the Board of Architectural Review, the Planning Commission, and others.
- The Commission Members should also present the plan to various civic groups that will spread the word about the effort. These presentations will build off the plan's



existing momentum while also fostering additional buy-in and participation in the implementation process.

- The Economic Development Commission should host an Economic Development "summit" meeting to begin working with those organizations and entities that will help carry the plan forward.
- *Develop the Leesburg Resource Center:* As mentioned in section 2.2, the Leesburg Resource Center is a place for visitors, residents, and investors to go for information about Leesburg. From the investor standpoint, the Leesburg Resource Center is a place to learn about plans for the future of the community, meet with economic development officials, and understand the necessary steps in the planning process. Consequently, the Leesburg Resource Center would be the home of the Economic Development Department and have a representative of the planning staff on hand to answer questions.

From, a resident's perspective, the Leesburg Resource Center is a place to learn how to organize neighborhood associations, a place to get information about the Board of Architectural Review process, and get information on the town plan.

Finally, the Leesburg Resource Center should have a "community board room" that could be used by groups for meetings. This room would be visible from the street so that the business of the town and its residents becomes part of the street life of downtown.

- *Create the Leesburg Merchants Guild:* The Leesburg Merchants Guild is the formal organization for local retailers and restaurateurs in Leesburg. The Guild would have a very specific role focusing on three key areas:
 1. Development of a co-marketing strategy and "brand" for locally owned shops and restaurants in Leesburg that can be available to all member merchants. This would also include the Leesburg Loyal Local program.
 2. Presentation of seminars on merchandising and storefront beautification for members and non-members alike to create a spirit of cooperation in the physical appearance of downtown.
 3. A group for advocacy of town policy that is friendly toward local shops and restaurants. This would include representation on the Leesburg EDC as well as the future Main Street Program as it develops in Leesburg.

By staying focused on these goals, the Leesburg Merchants Guild can concentrate on a pro-active approach toward the future of downtown and other business districts while also representing an advocacy group that evaluates town policy for business development from a business owner perspective.

Medium Term – 2004-2006

- *Create 501c Non-Profit Development Organization to Hold Land, Take Donations, and Assist with Major Development Projects:* Over time the town may want to develop an entity that can receive gifts of land and buildings, be more nimble in the way it conducts property assembly and transactions, and hold property. This is a natural progression as the Town moves toward a more proactive approach toward economic development. These organizations can take many forms including one that merely shadows the EDC in board composition and function while allowing for the flexibility to receive property from private individuals.

Long Term Recommendations – 2006-2010

- *Establish Other Business Development Districts:* Over time additional business districts will emerge that will require attention. New business associations, improvements strategies, and corridor plans will become necessary as these issues emerge.

3.0 Implementation Strategy and Action Plan

3.1 Downtown Projects and Initiatives

The attached “Strategy Board”, Exhibit 3.1, summarizes all of the projects and recommendations included in the Business Development Strategy. The board is intended to be used as working document for benchmarking and ongoing evaluation of the implementation process. Each recommendation that is presented in brief on the strategy board is supported in detail in this report documentation.

3.1.1 Strategies and Visions

Each of the plan strategies and visions are outlined in the strategy board. It is important to remember the ultimate marketing and development strategies that each project supports. Of course, each of these strategies is linked with one another, but failure to achieve any one goal does not negate the ability to achieve others.

3.1.2 Responsibilities

The strategy board presents suggestions for organizations or entities that will be responsible for leading the implementation of each of the projects. These are color-coded based on the individual agencies involved. While an agency may be assigned lead role for implementation, each of these projects should be pursued through partnerships. As the plan progresses, these responsibilities should be reevaluated to determine where roles should change or shift.

3.1.3 Time Frames

The projects are divided into three time frames. The first series of projects are demonstration projects that should begin immediately. For the most part, these are simple projects that will be highly visible, have significant impact and should be completed within the first two years after the plan is adopted. The second set of projects is labeled “next steps.” Some of these are more advanced projects while others are continuations of projects that began during the demonstration period. The next step projects should be completed within the following three years. The final series of projects are long-term or plan completion projects. While this category remains largely empty,

many of the projects begun in the next steps phase will not be completed until after the 2006 deadline. Several of the completion recommendations are simply benchmarks to be evaluated as development occurs. Over time this category will continue to fill up as priorities evolve.

The strategy board and its recommendations represent a “living document”. As time goes by and implementation proceeds, some priorities will shift while other ones will arise. The implementation strategy board should be evaluated periodically, no less than annually. This evaluation process will allow for finished tasks to be indicated on the board, for responsibilities to be shifted between parties, and for time frames to be adjusted for individual projects.

3.2 Funding Strategies

One of the most often asked questions regarding a plan of this nature is “How much is this going to cost?” The vast majority of the investments that will take place in the plan will occur in the private sector. Also, many of the recommendations are for future projects that will not be planned in any detail until some time later. Some of these will not only include construction costs, but also planning and design costs. Therefore, there is never a figure associated with the “cost to implement the plan.”

This report contains twenty-three recommendations that should be examined over the next two years. Only two of the twenty-three require a capital expenditure on the part of the Town Government: the development of the Leesburg Resource Center as part of an addition to Town Hall and the implementation of the Way Finding system which has already been budgeted by the Town.

An additional eight recommendations involve the completion and placement of marketing material. Many of the marketing concepts have been presented in “mock” form in the report. Putting these ads into print media and placing them should be a cooperative effort involving local businesses that already spend money on marketing material. The Town itself has been funding ad placement for a number of years. Specific costs depend on types of marketing venues (magazines, newspapers, brochures), and design and production of the materials themselves. In any case, marketing objectives and resources should be pooled by the different entities in order to create the maximum effect.

Three of the twenty-four recommendations over the next two years involve planning funds. While the Town of Leesburg has agreed to fund the parking management study, the Planning Department is requesting additional funding for the detailed master plans for the Crescent District and Market East. These are likely to be absorbed into the annual budget for this department. Once these master plans have been complete, cost estimates will be available for public sector improvements.

The final ten recommendations require only that Town Council, Town Staff, local citizens, and the business community work together in an unprecedented way to achieve the goals of the plan.

The next step recommendations will involve capital expenditures. The tax increment plan proposed in section 2.3 should be the primary source of funds for this project.

Now is the perfect time to begin examining this source of funding for the project while the economy has slowed.

3.3 Conclusion

This report is the product of an unprecedented effort on the part of the Town of Leesburg to engage the community in an effort to examine the future business success of the town. It is only through this continued spirit of partnership that the plan can be successful. Leesburg, Virginia has sustained and enhanced itself as a vibrant community for over two hundred years. This plan, through the input of hundreds of Leesburg's citizens and stakeholders, will be a roadmap for continued success well into the future.

A Business Development Strategy for Leesburg, Virginia

| Strategies | First Steps '03-'04 | Next Steps '04-'06 | Completion '06-'10 | Visions |
|--|---|--|---|---|
| Hometown Downtown: A Place for Leesburg Residents | <ul style="list-style-type: none"> • Create "Leesburg Events" non-profit to coordinate events. • Conduct weekly seasonal events in downtown • Launch Leesburg Hometown Downtown marketing strategy • Begin "Leesburg Local" loyalty program | <ul style="list-style-type: none"> • Research sites for Leesburg Arts Center • Examine opportunities for public art • Continue to facilitate and market diverse retail uses serving local residents & workers • Enhance existing retail districts • Consider creating new downtown event spaces . | <ul style="list-style-type: none"> • Construct Leesburg Center for the Arts • Construct 30 new residential units in the downtown area • Develop a net of 12 new retail/restaurant establishments in downtown | Leesburg's downtown becomes a gathering place for residents on a regular basis offering entertainment, dining, and shopping for local citizens. |
| The Seamless Experience: A Visitor Strategy | <ul style="list-style-type: none"> • Develop parking management plan and implement recommendations • Implement way-finding system • Complete unified visitor marketing material • Launch Co-op marketing geared at DC metro • Develop the Leesburg Resource Center | <ul style="list-style-type: none"> • Develop co-op marketing strategies for Dodona Manor, Morven Park, Balch Library etc. • Facilitate public/private venture with Dodona, to design and construct "Market East" gateway improvement. • Create a hierarchy of gateway improvements | <ul style="list-style-type: none"> • Implement Route 7 and King (Route 15) streetscape enhancements | Visitors are provided with a unified experience to immerse them in the opportunities to explore Leesburg |
| Expanding Downtown: The Crescent District and Market East | <ul style="list-style-type: none"> • Explore development opportunities along Town Branch • Develop master plan for "The Crescent District" • Develop master plan for the "Market East District" • Recruit and promote quality infill development | <ul style="list-style-type: none"> • Develop design for pedestrian improvements along Town Branch – construct phase I • Explore creating a tax increment district in downtown to pay for public infrastructure costs • Explore public/private ventures to begin development of districts | <ul style="list-style-type: none"> • Construct phase II and III of Town Branch pedestrian improvements | Downtown economic development opportunities expand into other areas of downtown reinforcing existing neighborhoods and creating |
| A New Market for Leesburg: Live/Work/Play | <ul style="list-style-type: none"> • Launch marketing program to recruit entrepreneurs to Leesburg • Market upper floor residential and infill dvlpmt. • Conduct Targeted Industry Study • Complete & connect town's Greenway system • Begin EDC "Business Development Network" | <ul style="list-style-type: none"> • Assemble property for industrial/business dev. • Partner with residential developers to facilitate creative development in Crescent & Townwide • Incorporate mixed use districts & higher density residential development into town plan • Explore uses for Westpark site | <ul style="list-style-type: none"> • Recruit 1000 new jobs to Leesburg • Recruit 7 new high-quality industries/businesses to Leesburg | Leesburg becomes known as the DC region's premiere location for entrepreneurs offering small businesses a place to grow and thrive. |
| Leesburg Heritage: Celebrating & Preserving Character | <ul style="list-style-type: none"> • Distribute brochure detailing the basics for development in the Old and Historic District • Host a preservation forum to discuss issues • Create the "development preview team" to assist investors on improvements • Create Leesburg Heritage Tourism marketing | <ul style="list-style-type: none"> • Develop façade grant and/or improvement grant (landscaping/parking) for targeted areas in Leesburg • Expand/enhance existing streetscape | <ul style="list-style-type: none"> • Continue to expand/enhance existing streetscapes. | Leesburg's unique historic character is the hallmark of the community making Leesburg a national destination for preservation and heritage |
| Getting the Job Done: Organizing for the Future | <ul style="list-style-type: none"> • Establish Downtown Manager Position • Focus EDC on Infrastructure, Townwide Development Policy, and Business Relations • Develop the Leesburg Resource Center • Create the Leesburg Merchants Guild | <ul style="list-style-type: none"> • Create a 501c Non-Profit Development Organization to hold land, take donations, and assist with major development projects. | <ul style="list-style-type: none"> • Establish other business development districts in Leesburg | The Town of Leesburg is poised to handle future development and become a active partner in public private ventures for Economic |

Appendix A: Strategic Assessment of Leesburg, Virginia

1.0 Introduction

The following is the “raw” information shared during the over forty individual and small group interviews conducted between August and October of 2002. These comments do not necessarily reflect the opinion of the consultants but instead reflect summaries of input received categorized into key topics.

2.0 What We’ve Heard – Interview and Input Summaries

2.1 What We’ve Heard – Assets

- Downtown is extremely attractive.
- The distinguished architecture and great historic feel really set downtown apart.
- Attractive window dressing of shops.
- Quality merchants.
- There are several restaurants downtown that bring people downtown on a regular basis.
- Tally Ho as an opportunity to bring people back into downtown on a regular basis.
- Events are popular with citizens even if street closures are controversial.

2.2 What We’ve Heard – Challenges

- Developing in Leesburg is a regulatory quagmire. Many interviewees were discouraged by the amount of time it takes to have development take place. Others shared anecdotes about inconsistencies in the development process.
- Board of Architectural Review regulations were the most consistently cited challenges to business development in Leesburg. Comments shared in the interviews included thoughts that the BAR process was too onerous, inconsistent, unfriendly, unhelpful, adversarial, discourage creativity, etc...

- Concern about local population does not take advantage of downtown on a regular basis.

2.3 What We've Heard – Needs

- Restrooms downtown.
- Parking was an issue that many interviewees had divergent views on. Unlike many communities where parking emerges as the most controversial issue, Leesburg's interviewees had no consistent viewpoint on parking or the lack thereof. The most often cited parking issue was the lack of signing to direct visitors to parking resources. Others were concerned with employees using customer on-street spaces. Still others did feel that there was a lack of parking overall.
- Gathering space for events and activities.
- General clean up particularly along alleys and behind buildings.
- Expand idea of what downtown is to include areas that are currently underdeveloped.

2.4 What We've Heard – Retail

- New versus old mentality – lack of cohesion with retailers and the existence of “cliques” of retailers downtown.
- Not enough local oriented retail to serve the local population – lack of diversity in retail types that would appeal to locals.
- Businesses being run as a hobby which results in part time hours and a lack of business acumen with some shopkeepers.
- Need diversity of restaurants downtown (ethnic, family oriented, etc) that would bring more people into downtown regularly.
- Retail rents are going up on several properties that are disproportionate to typical market increases. Several interviewees indicated that rents were increasing dramatically without simultaneous improvements of property.

2.5 What We've Heard – Residential

- Desperate need for affordable housing options in town that would appeal to young professionals and empty nesters, particularly in the downtown area.

- Very little variety in downtown core housing (lofts, close-in residential, condos, etc.). Much of the housing stock is single family detached.
- The downtown area has excellent walking connections to the core residential district
- Need to attract young families and professionals to the downtown to live.

2.6 What We've Heard – Office

- Small professional office users are having a lot of success in downtown and throughout the town.
- Need for more small professional office space (not just for businesses serving the government).
- Need for fiber optics or satellite connections downtown so that small businesses can have high speed internet access.
- Several indicated concern about professional office space taking over prime retail spots in the downtown.

2.7 What We've Heard – Employment

- Lack of mixed-use spaces that have employment, residential, and retail in one development.
- Lack of sites available for major employment and office users to locate in Leesburg and a lack of sites for retention and expansion of existing businesses.
- Sites that are available have no infrastructure ready resulting in businesses moving to other areas.
- Office sites downtown that lack telecommunications infrastructure.
- Need for properties designed to support particular industries such as biotech as a way to attract business to Leesburg.

2.8 What We've Heard – Organization

- EDC has taken a leadership role in many economic development efforts and is emerging as an important player in the future of Leesburg.

- Investors have had successful interaction with individual staff at the Town of Leesburg.
- A lot of enthusiasm/positive energy about the future.
- The Town of Leesburg needs a clear focus with Economic Development.
- Inconsistent image and inconsistent message on whether the Town want development or not.
- A lot of talk and not much action.
- The town is “mired down in bureaucratic soup”
- Need for a look at the big picture.
- Need for leadership throughout the community to champion business development.

3.0 What We’ve Seen – Physical Analysis

3.1 Physical Analysis – Downtown Core

- Number one asset! Outstanding pedestrian scale, architecture, details, and preservation – distinct sense of place.
- Courthouse Square and Town Green are great assets.
- The details in downtown (benches, planters, etc.) provide a sense of “authenticity” for the area but also pose challenges when these items are not cared for properly.
- Pedestrian friendly (mostly).
- Attractions are assets and close to downtown (Loudoun County Museum, Dodona Manor, Thomas Balch Library)

3.2 Physical Analysis – Outside of Core

- Development quality – landscape is nice, architecture is generally good
- Site design often does not reflect the historic town fabric with a more suburban feel. Some areas are extremely congested and dominated by the automobile.
- What is downtown? We think other districts could be recognized particularly along Town Branch and where Market and Loudoun Street come together near Dodona Manor.

3.3 Physical Analysis – Parks/Open Space

- Outstanding parks and park facilities and a comprehensive 20 Year Parks and Recreation Master Plan to support future improvements.
- W&OD Trail is a critical but often underrated and invisible attraction.
- Physically the greenway network is not yet connected as a system.
- Trail System and Pedestrian Linkages existing and future

3.4 Physical Analysis – Corridors/Gateways

- Need for way-finding program (currently being addressed)
- Theme to preserve: Gateway to Rural and Gateway to Urban which is a key distinction in Leesburg. The transition from urban feel to rural is profound.

3.5 Physical Analysis – Critical Parcels

- Historic Core and Catoclin Circle Infill
- Dodona Manor Holdings
- South King Street/Town Branch/Barber & Ross area
- Town Perimeter Parcels such as those along Route 15 to the South and North of the Town that present a pleasant rural feel.

Appendix B: A Market Assessment of Leesburg, Virginia

1.0 Introduction

Many of the strategies for Leesburg rely on analysis of the market conditions that affect the community. This appendix presents the findings of the market research for Leesburg and provides detailed analysis that can be used to recruit business, help existing businesses target customers, and develop and refine a marketing strategy so that Leesburg remains competitive in the years to come.

This effort provides a snapshot of retail trade patterns in the community from which certain conclusions can be drawn. This study does not necessarily reflect the exact trade patterns that a particular business might see through the course of the year. But, the information provided does provide valuable insight into the trade area for Leesburg.

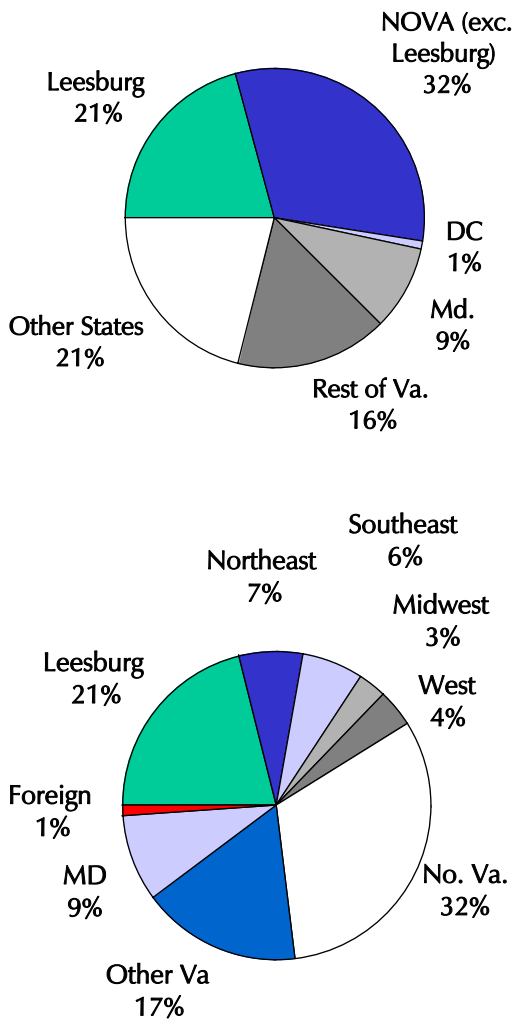
The resulting sales and consumer expenditure patterns for the areas studied then become very accurate tools to evaluate the amount of retail sales “leaking” from the community. This information is based on the most recent data available and are a very reliable source for understanding market patterns.

This appendix is divided into two parts. The first describes the zip code survey and analysis presenting the findings and a definition of the market. The second section provides two distinct retail market analyses. Each section concludes with some key findings.

It is these findings that have informed many of the marketing, economic, and organizational recommendations of the main report. This section in its entirety, can be used as a marketing and recruitment tool for individual businesses seeking to set up shop in Leesburg and for existing businesses wishing to develop marketing plans or expand product lines.

2.0 Market Definition

In October of 2002 fourteen Leesburg businesses participated in a zip code survey of their customers. Merchants were provided with a form to record customer zip codes and asked to keep the log for all customers during one-week period. In all, 1498 zip codes were recorded during the one-week period.



2.1 Zip Code Results

The results of the zip code survey are listed below:

- During the one-week period businesses recorded customers from 455 unique different zip codes, thirty-nine states, the District of Columbia, and seven foreign countries.
- Twenty-one percent (21%) of the customers came from the 20175 and 20176 Leesburg zip codes.
- An additional 32% of the customers came from northern Virginia.
- Maryland accounted for 9% of the customer visits and 21% of the customers came from other states.
- The District of Columbia accounted for 1% of customer visits.

The charts at left provide further insight into the breakdown of customer visits to the participating stores.

2.2 Trade Area Definitions

Since zip codes each have different populations, customer visits are most accurately tracked on the number of visits in relation to the population. The table below shows customer visits per 1,000 population for each of the highest representative visits.

| Zip Code | Name | Customer Visits | % of Total Visits | Population | Cust/1,000 population |
|--------------|--------------|-----------------|-------------------|------------|-----------------------|
| 20170, 20171 | Herndon | 15 | 0.6% | 76,555 | 0.2 |
| 20108-20112 | Manassass | 29 | 1.2% | 116,241 | 0.2 |
| 20120, 20121 | Centreville | 21 | 0.8% | 63,827 | 0.3 |
| 20164-20167 | Sterling | 56 | 2.3% | 71,201 | 0.8 |
| 20190-20195 | Reston | 47 | 1.9% | 58,128 | 0.8 |
| 20147-20148 | Ashburn | 68 | 2.7% | 36,205 | 1.9 |
| 20180 | Lovettsville | 15 | 0.6% | 4,623 | 3.2 Secondary |
| 20117, 20118 | Middleburg | 11 | 0.4% | 3,293 | 3.3 Secondary |
| 20141 | Round Hill | 12 | 0.5% | 3,169 | 3.8 Secondary |
| 20132 | Purcellville | 42 | 1.7% | 9,639 | 4.4 Secondary |
| 20158 | Hamilton | 16 | 0.6% | 3,400 | 4.7 Secondary |
| 20176 | Leesburg | 164 | 6.6% | 22,477 | 7.3 Primary |
| 20175 | Leesburg | 146 | 5.9% | 18,414 | 7.9 Primary |
| 20197 | Waterford | 21 | 0.8% | 1,213 | 17.3 Primary |

Figure B-1: Customer Visits Per Thousand in top tier zip codes. Arnett Muldrow & Associates and Claritas Inc.

By this measure, downtown Leesburg's primary retail trade area is defined as the following three zip codes. These zip codes had over five customer visits per thousand residents in each area.

- Waterford 20197
- Leesburg 20175, 20176

Customers from these zip codes represented 13.3% of the total visits during the survey period.

Seven additional zip codes listed on the table to the left had over two visits per thousand residents. These are:

- Hamilton 20158
- Purcellville 20132
- Round Hill 20141
- Middleburg 20117, 20118
- Lovettsville 20180

In all 3.8% of the total visits originated in these zip codes.

2.3 Market Definition Conclusions

- 13.3% of total visits coming from the Primary Trade Area is an unusually low number indicating that the businesses participating in the survey (downtown businesses) are not geared toward the local population base.
- This information is further augmented when the number of customer visits per thousand is observed at less than eight visits per thousand residents in Leesburg.
- Nevertheless, a Primary Trade area can be defined in spite of these numbers that places the local market squarely in the Leesburg and Waterford zip codes.
- The secondary trade area is toward the west revealing that, in many ways, Leesburg's merchants are still operating much like the traditional farm-to-market or county seat community that is Leesburg's heritage. While this market is critical, the most robust growth from a visitor standpoint is toward DC to the east.
- The chart indicates that 2.7% of the customer visits came from Ashburn. While on the surface this seems impressive, the large population in Ashburn "waters this down" to less than two visits per thousand. Ashburn is an area of opportunity where the market penetration could be much deeper.

- Even more important are the statistics related to communities like Herndon, Centreville, Sterling, and Reston where local population is clearly not interacting with downtown Leesburg on a regular basis. These areas represent huge market opportunities for local businesses.

3.0 Retail Market Analysis

As a county seat, Leesburg is a retail center serving a diverse market defined above. In this section the Leesburg retail market will be examined to identify potential opportunities for retail. This section will look at retail in Leesburg in two key studies:

1. A retail leakage analysis that will look at the primary and secondary trade areas to see how much money is “leaking” from the area to stores in other areas. From this, two “capture scenarios” will be developed to illustrate how much retail space could potentially be brought back into Leesburg based on the demand in the market.
2. A retail shares analysis that examines performance of retail stores in Leesburg’s primary trade area as a benchmark of the greater region.

3.1 Retail Sales At a Glance

There are approximately 411 retail establishments in Leesburg’s primary trade area with combined annual sales of \$607 million. Retailers employ 4610 people making retail a major component of the Leesburg’s economy.

In Leesburg’s secondary trade area there are 239 establishments with \$162 million in sales. Secondary trade area retailers employ 1350 people. The secondary trade area is a more rural area, which accounts for the lower sales figures and number of establishments further accenting Leesburg’s position as a trading center for the surrounding areas.

The table on the following page details the establishments in Leesburg’s primary and secondary trade areas, their sales, and their number of employees by selected retail categories.

3.2 Retail Leakage

“Retail Leakage” refers to the difference between the retail expenditures by residents living in a particular area and the retail sales produced by the stores located in the same area. If desired products are not available within that area, consumers will travel to other places or use different methods to obtain those products. Consequently, the dollars spent outside of the area are said to be “leaking”. If a community is a major retail center with a variety of stores it will be “attracting” rather than “leaking” retail sales. Even large communities may see leakage in certain retail categories.

Such an analysis is not an exact science. In some cases large outflow may indicate that money is being spent elsewhere (drug store purchases at a Wal-Mart or apparel purchases through mail-order). It is important to note that this analysis accounts best for retail categories where households (rather than businesses) are essentially the only consumer groups. For example, hardware stores may have business sales that are not accounted for in consumer expenditures. Stores such as jewelry shops and clothing stores are more accurately analyzed using this technique.

3.2.1 *Retail Leakage in the Primary Trade Area*

The retail leakage analysis of Leesburg’s primary trade area 20175, 20176 and 20197 suggests that, overall, Leesburg, has an inflow of sales related to the local population’s expenditures.

When selected categories are examined, the inflow comes from hardware, grocery stores, department stores, and gift stores. Selected retail categories, notably drug stores, bookstores, home furnishings, and furniture stores are leaking sales.

Each of these categories present opportunities for businesses to capitalize on the market. Even an “attractor” such as restaurant sales, suggests that Leesburg has a robust ability to attract diners from a large area.

The table on the following page details the consumer expenditures, retail sales, and inflow/outflow of dollars in the community.

| | | Sales | | Expenditures | | Leakage (Inflow) |
|-----------------------------------|----|-------------|----|--------------|----|------------------|
| | | PTA | | PTA | | PTA |
| ALL RETAILING (SIC 52-59) | \$ | 607,000,000 | \$ | 394,546,720 | \$ | (212,453,280) |
| SELECTED RETAIL CATEGORIES BELOW | \$ | 295,100,000 | \$ | 283,767,527 | \$ | (11,332,473) |
| BUILDING MATERIAL AND SUPPLY | \$ | 19,700,000 | \$ | 11,646,776 | \$ | (8,053,224) |
| HARDWARE STORES | \$ | - | \$ | 824,162 | \$ | 824,162 |
| NURSERIES & GARDEN SUPPLY STORES | \$ | 1,600,000 | \$ | 2,634,795 | \$ | 1,034,795 |
| DEPARTMENT STORES | \$ | 47,300,000 | \$ | 44,179,520 | \$ | (3,120,480) |
| GROCERY STORES | \$ | 83,100,000 | \$ | 78,988,888 | \$ | (4,111,112) |
| AUTO AND HOME SUPPLY STORES | \$ | 7,600,000 | \$ | 2,665,687 | \$ | (4,934,313) |
| APPAREL AND ACCESSORY STORES | \$ | 16,600,000 | \$ | 22,984,684 | \$ | 6,384,684 |
| WOMEN'S ACCESSORY & SPECIALTY | \$ | - | \$ | 467,315 | \$ | 467,315 |
| SHOE STORES | \$ | 11,400,000 | \$ | 2,601,602 | \$ | (8,798,398) |
| FURNITURE STORES | \$ | 6,400,000 | \$ | 8,848,103 | \$ | 2,448,103 |
| HOME FURNISHINGS | \$ | 5,500,000 | \$ | 6,515,150 | \$ | 1,015,150 |
| HOUSEHOLD APPLIANCE STORES | \$ | 1,700,000 | \$ | 2,733,118 | \$ | 1,033,118 |
| RADIO,TV,CONSUM.ELEC.,MUSIC STORE | \$ | 4,800,000 | \$ | 6,191,648 | \$ | 1,391,648 |
| EATING AND DRINKING PLACES | \$ | 62,300,000 | \$ | 54,097,232 | \$ | (8,202,768) |
| DRUG STORES & PROPRIETARY STORES | \$ | 10,200,000 | \$ | 18,239,590 | \$ | 8,039,590 |
| SPORTING GOODS & BICYCLE STORES | \$ | 4,400,000 | \$ | 3,186,758 | \$ | (1,213,242) |
| BOOK STORES | \$ | 1,400,000 | \$ | 3,365,258 | \$ | 1,965,258 |
| JEWELRY STORES | \$ | 2,000,000 | \$ | 4,491,920 | \$ | 2,491,920 |
| HOBBY, TOY, AND GAME SHOPS | \$ | 1,300,000 | \$ | 3,597,088 | \$ | 2,297,088 |
| CAMERA/PHOTOGRAPHIC SUPPLY | \$ | - | \$ | 898,201 | \$ | 898,201 |
| GIFT, NOVELTY, AND SOUVENIR | \$ | 5,200,000 | \$ | 2,288,086 | \$ | (2,911,914) |
| LUGGAGE AND LEATHER GOODS | \$ | 600,000 | \$ | 404,368 | \$ | (195,632) |
| SEWING/NEEDLEWORK/PIECE GOODS | \$ | 400,000 | \$ | 1,115,144 | \$ | 715,144 |
| FLORISTS | \$ | 1,600,000 | \$ | 802,434 | \$ | (797,566) |

3.2.2 Retail Leakage in the Secondary Trade Area

3.2.3 Retail Leakage in the Secondary Trade Area

Not surprisingly, a similar analysis looking at the secondary trade area reveals some very different patterns. Being a rural area, the secondary trade area is leaking retail sales in nearly every retail category with the exception of hardware, nurseries (probably attributable to business to business sales), auto supply, florists, and gifts.

Leesburg has the opportunity to further enhance its retail offerings by marketing to the secondary trade area to capture some of this "lost revenue."

| | | Sales STA | | Expenditures STA | | Leakage (Inflow) STA |
|-----------------------------------|----|--------------|----|---------------------|----|-------------------------|
| ALL RETAILING (SIC 52-59) | \$ | 162,300,000 | \$ | 280,675,616 | \$ | 118,375,616 |
| SELECTED RETAIL CATEGORIES BELOW | \$ | 103,200,000 | \$ | 197,951,671 | \$ | 94,751,671 |
| BUILDING MATERIAL AND SUPPLY | \$ | 6,600,000 | \$ | 8,827,873 | \$ | 2,227,873 |
| HARDWARE STORES | \$ | 2,700,000 | \$ | 636,800 | \$ | (2,063,200) |
| NURSERIES & GARDEN SUPPLY STORES | \$ | 13,000,000 | \$ | 3,642,159 | \$ | (9,357,841) |
| DEPARTMENT STORES | \$ | - | \$ | 32,595,786 | \$ | 32,595,786 |
| GROCERY STORES | \$ | 36,900,000 | \$ | 49,185,400 | \$ | 12,285,400 |
| AUTO AND HOME SUPPLY STORES | \$ | 2,600,000 | \$ | 2,054,628 | \$ | (545,372) |
| APPAREL AND ACCESSORY STORES | \$ | 2,700,000 | \$ | 17,078,442 | \$ | 14,378,442 |
| WOMEN'S ACCESSORY & SPECIALTY | \$ | - | \$ | 345,074 | \$ | 345,074 |
| SHOE STORES | \$ | - | \$ | 3,591,008 | \$ | 3,591,008 |
| FURNITURE STORES | \$ | 5,800,000 | \$ | 7,024,216 | \$ | 1,224,216 |
| HOME FURNISHINGS | \$ | 900,000 | \$ | 5,227,342 | \$ | 4,327,342 |
| HOUSEHOLD APPLIANCE STORES | \$ | 1,200,000 | \$ | 2,099,513 | \$ | 899,513 |
| RADIO,TV,CONSUM.ELEC.,MUSIC STORE | \$ | 200,000 | \$ | 4,718,879 | \$ | 4,518,879 |
| EATING AND DRINKING PLACES | \$ | 18,100,000 | \$ | 33,602,965 | \$ | 15,502,965 |
| DRUG STORES & PROPRIETARY STORES | \$ | 5,600,000 | \$ | 12,475,606 | \$ | 6,875,606 |
| SPORTING GOODS & BICYCLE STORES | \$ | 1,800,000 | \$ | 2,441,284 | \$ | 641,284 |
| BOOK STORES | \$ | 200,000 | \$ | 2,445,545 | \$ | 2,245,545 |
| JEWELRY STORES | \$ | 800,000 | \$ | 3,255,191 | \$ | 2,455,191 |
| HOBBY, TOY, AND GAME SHOPS | \$ | 200,000 | \$ | 2,710,713 | \$ | 2,510,713 |
| CAMERA/PHOTOGRAPHIC SUPPLY | \$ | - | \$ | 690,743 | \$ | 690,743 |
| GIFT, NOVELTY, AND SOUVENIR | \$ | 1,700,000 | \$ | 1,570,968 | \$ | (129,032) |
| LUGGAGE AND LEATHER GOODS | \$ | - | \$ | 301,666 | \$ | 301,666 |
| SEWING/NEEDLEWORK/PIECE GOODS | \$ | 100,000 | \$ | 848,267 | \$ | 748,267 |
| FLORISTS | \$ | 2,100,000 | \$ | 581,603 | \$ | (1,518,397) |

Figure B-4: Retail Leakage in the Secondary Trade Area Source Claritas Inc. and Arnett Muldrow & Associates

Source: Claritas and Arnett Muldrow & Associates

3.2.4 Market Potential Analysis

Leesburg's downtown cannot reasonably expect to capture all of the leaking sales from retail categories however so we must look at a potential capture scenario that might illustrate the potential for additional downtown retail should some of the lost revenues be captured.

The table below illustrates the new or expanded retail space that could be supported in Leesburg by capturing these sales under a scenario where 20% of leakage from the primary trade area is captured and 10% of the leakage from the secondary trade area is captures. The sales per square foot for retail store types have been obtained from Dollars and Cents of Shopping Centers: 1997, published by the Urban Land Institute.

| | 20% of PTA Outflow | 10% of STA Outflow | Potential Capture | Sales Per Square Foot | Calculated Capture |
|-----------------------------------|--------------------|--------------------|-------------------|-----------------------|--------------------|
| ALL RETAILING (SIC 52-59) | \$ (42,490,656) | \$ 11,837,562 | \$ (30,653,094) | | |
| SELECTED RETAIL CATEGORIES BELOW | \$ (2,266,495) | \$ 9,475,167 | \$ 7,208,673 | | 74,982 |
| BUILDING MATERIAL AND SUPPLY | \$ (1,610,645) | \$ 222,787 | \$ (1,387,858) | \$ 142.38 | |
| HARDWARE STORES | \$ 164,832 | \$ (412,640) | \$ (247,808) | \$ 121.08 | |
| NURSERIES & GARDEN SUPPLY STORES | \$ 206,959 | \$ (1,871,568) | \$ (1,664,609) | \$ 145.00 | |
| DEPARTMENT STORES | \$ (624,096) | \$ 3,259,579 | \$ 2,635,483 | \$ 133.90 | 19,682 |
| GROCERY STORES | \$ (822,222) | \$ 1,228,540 | \$ 406,318 | \$ 371.79 | 1,093 |
| AUTO AND HOME SUPPLY STORES | | | \$ - | \$ 147.52 | - |
| APPAREL AND ACCESSORY STORES | \$ 1,276,937 | \$ 1,437,844 | \$ 2,714,781 | \$ 164.60 | 16,493 |
| WOMEN'S ACCESSORY & SPECIALTY | \$ 93,463 | \$ 34,507 | \$ 127,970 | \$ 178.17 | 718 |
| SHOE STORES | \$ (1,759,680) | \$ 359,101 | \$ (1,400,579) | \$ 158.81 | |
| FURNITURE STORES | \$ 489,621 | \$ 122,422 | \$ 612,042 | \$ 141.84 | 4,315 |
| HOME FURNISHINGS | \$ 203,030 | \$ 432,734 | \$ 635,764 | \$ 167.75 | 3,790 |
| HOUSEHOLD APPLIANCE STORES | \$ 206,624 | \$ 89,951 | \$ 296,575 | \$ 245.44 | 1,208 |
| RADIO,TV,CONSUM.ELEC.,MUSIC STORE | \$ 278,330 | \$ 451,888 | \$ 730,218 | \$ 207.17 | 3,525 |
| EATING AND DRINKING PLACES | \$ (1,640,554) | \$ 1,550,297 | \$ (90,257) | \$ 201.63 | |
| DRUG STORES & PROPRIETARY STORES | \$ 1,607,918 | \$ 687,561 | \$ 2,295,479 | \$ 247.29 | 9,283 |
| SPORTING GOODS & BICYCLE STORES | \$ (242,648) | \$ 64,128 | \$ (178,520) | \$ 153.46 | |
| BOOK STORES | \$ 393,052 | \$ 224,555 | \$ 617,606 | \$ 161.16 | 3,832 |
| JEWELRY STORES | \$ 498,384 | \$ 245,519 | \$ 743,903 | \$ 263.92 | 2,819 |
| HOBBY, TOY, AND GAME SHOPS | \$ 459,418 | \$ 251,071 | \$ 710,489 | \$ 146.28 | 4,857 |
| CAMERA/PHOTOGRAPHIC SUPPLY | \$ 179,640 | \$ 69,074 | \$ 248,715 | \$ 542.63 | 458 |
| GIFT, NOVELTY, AND SOUVENIR | \$ (582,383) | \$ (12,903) | \$ (595,286) | \$ 168.55 | |
| LUGGAGE AND LEATHER GOODS | \$ (39,126) | \$ 30,167 | \$ (8,960) | \$ 198.82 | |
| SEWING/NEEDLEWORK/PIECE GOODS | \$ 143,029 | \$ 74,827 | \$ 217,856 | \$ 74.91 | 2,908 |
| FLORISTS | \$ (159,513) | \$ (151,840) | \$ (311,353) | \$ 149.82 | |

Figure B-5: Capture Scenario One 20% of PTA and 10% of STA, Arnett Muldrow & Associates and Claritas Inc.

Based on this scenario table, Leesburg could support 75,000 of additional retail space. This is only based on the existing trade areas and does not relate to the first analysis of market definition, which suggested expanding the trade area potential to other nearby communities.

Clearly, certain store types can be supported such as:

- Book stores
- Drug and variety stores
- Furniture and Home Furnishing Stores
- Apparel stores

For the downtown area in particular, the furniture and home furnishings provide particular promise since these types of retail will complement this existing mix.

Additionally, several other demand indicators might help existing businesses expand their merchandise mix to attract shoppers who are otherwise going somewhere else to buy these products.

3.3 Retail Shares Analysis

Retail shares analysis places Leesburg's primary trade area businesses as a proportion of the larger region. This, in turn, is used to benchmark selected retail categories to determine if particular retail types are underperforming (representing an opportunity for expansion) or performing exceptionally well (representing an opportunity for clustering additional related businesses around a strength).

Businesses located in Leesburg's combined trade area (excluding automotive related retail) account for 4.91% of all retail within a three county area including Loudoun, Fairfax, and Fauquier.

| | METRO | CTA | Share |
|-----------------------------------|------------------|----------------|--------|
| ALL RETAILING (SIC 52-59) | \$ 1,968,200,000 | \$ 769,300,000 | |
| SELECTED RETAIL CATEGORIES BELOW | \$ 8,104,200,000 | \$ 398,300,000 | 4.91% |
| BUILDING MATERIAL AND SUPPLY | \$ 757,600,000 | \$ 26,300,000 | 3.47% |
| HARDWARE STORES | \$ 54,400,000 | \$ 2,700,000 | 4.96% |
| NURSERIES & GARDEN SUPPLY STORES | \$ 277,700,000 | \$ 14,600,000 | 5.26% |
| DEPARTMENT STORES | \$ 1,066,600,000 | \$ 47,300,000 | 4.43% |
| GROCERY STORES | \$ 2,156,000,000 | \$ 120,000,000 | 5.57% |
| AUTO AND HOME SUPPLY STORES | \$ 357,700,000 | \$ 10,200,000 | 2.85% |
| APPAREL AND ACCESSORY STORES | \$ 292,500,000 | \$ 19,300,000 | 6.60% |
| WOMEN'S ACCESSORY & SPECIALTY | \$ 16,100,000 | \$ - | 0.00% |
| SHOE STORES | \$ 91,100,000 | \$ 11,400,000 | 12.51% |
| FURNITURE STORES | \$ 317,000,000 | \$ 12,200,000 | 3.85% |
| HOME FURNISHINGS | \$ 91,200,000 | \$ 6,400,000 | 7.02% |
| HOUSEHOLD APPLIANCE STORES | \$ 84,200,000 | \$ 2,900,000 | 3.44% |
| RADIO,TV,CONSUM.ELEC.,MUSIC STORE | \$ 229,700,000 | \$ 5,000,000 | 2.18% |
| EATING AND DRINKING PLACES | \$ 1,658,600,000 | \$ 80,400,000 | 4.85% |
| DRUG STORES & PROPRIETARY STORES | \$ 191,100,000 | \$ 15,800,000 | 8.27% |
| SPORTING GOODS & BICYCLE STORES | \$ 81,900,000 | \$ 6,200,000 | 7.57% |
| BOOK STORES | \$ 46,500,000 | \$ 1,600,000 | 3.44% |
| JEWELRY STORES | \$ 47,200,000 | \$ 2,800,000 | 5.93% |
| HOBBY, TOY, AND GAME SHOPS | \$ 79,400,000 | \$ 1,500,000 | 1.89% |
| CAMERA/PHOTOGRAPHIC SUPPLY | \$ 30,300,000 | \$ - | 0.00% |
| GIFT, NOVELTY, AND SOUVENIR | \$ 111,700,000 | \$ 6,900,000 | 6.18% |
| LUGGAGE AND LEATHER GOODS | \$ 6,800,000 | \$ 600,000 | 8.82% |
| SEWING/NEEDLEWORK/PIECE GOODS | \$ 17,800,000 | \$ 500,000 | 2.81% |
| FLORISTS | \$ 41,100,000 | \$ 3,700,000 | 9.00% |

3.3.1 Selected Results

The table above tallies the results of the shares analysis. Several key retail categories appear as strong or weak performers when examining the table.

In the combined trade area: shoes, apparel, gifts, home furnishings, and drug stores and certain other retail categories are performing above the benchmark 4.91% of the share.

Weak performers in the primary trade area are furniture, hobby stores, book stores, and sewing notions.

The rest of the categories generally performed on par with the overall shares analysis in both the primary and the combined trade areas.

3.3.2 Conclusions of the Retail Shares Analysis

1. In this analysis, home furnishings is appearing as a strong cluster for the community. This coupled with pent-up demand for home furnishings in the community sets the stage for continued growth in this segment.
2. Clearly, Leesburg Corner premium outlets is having an impact on the soft goods categories.
3. Restaurants are only performing at par suggesting that Leesburg could enhance its regional position as a specialty dining destination.